

Global Guide 2013

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INTRODUCTION

Mission and Structure: Supported by the U.S. Department of State's Bureau of Educational and Cultural Affairs (ECA), the EducationUSA network consists of advising centers in nearly every country of the world. ECA's mission is to build mutual understanding between the people of the United States and the people of other countries. The EducationUSA network supports this mission by increasing American and international student mobility. EducationUSA advisers work in U.S. embassies and consulates and in partner institutions that include Fulbright commissions; bi-national cultural centers; U.S. non-governmental organizations (NGOs); foreign NGOs; and foreign universities and libraries. Advisers help international students and their families to navigate the U.S. college admissions process by providing accurate, comprehensive, and current information.

Over 1,400 institutions /
3,400 U.S. higher ed
professionals enjoy login
access to EducationUSA

3,800+
subscribers to
the HEI eNews

Regional Educational Advising Coordinators (REACs):

Regional educational advising coordinators develop and lead advisers in the EducationUSA network, which is organized into six geographic regions: East Asia and the Pacific (EAP), Europe and Eurasia (EUR), Middle East and North Africa (NEA), South and Central Asia (SCA), Sub-Saharan Africa (AF), and the Western Hemisphere (WHA). REACs assess, train, and guide advising centers in an effort to maintain and improve the quality of their work. Regional coordinators may also serve as resources on local educational systems and the development of strategies for increasing international student mobility for the U.S. higher education community. For an up-to-date list of REACs, visit www.educationusa.state.gov.

Programs and Services: EducationUSA Advising Centers offer a variety of services to assist both international students and the U.S. higher education community. For international students, advising centers provide group advising sessions, virtual advising services, individual advising appointments, pre-departure orientations, and information about the U.S. higher education system and individual institutions. The U.S. higher education community can look to the EducationUSA network for advice about developing regional and country-specific recruitment strategies, creating programs and products to connect with students, and obtaining information about application and admission issues. EducationUSA advisers also use their expertise to help U.S. institutions develop relationships with local universities for study abroad programs.



803,317

Unique visitors
to the EducationUSA website
in 2012

Over
500

Weekly Update
stories from U.S.
institutions in 2012

"Your 5 Steps to U.S. Study": EducationUSA's "Your 5 Steps to U.S. Study" guides international students through the application and admission processes for undergraduate, graduate, and English-language programs, as well as short-term educational opportunities at U.S. colleges and universities. It gives students a timeline and practical tips that help them navigate through the following stages: 1) Research Your Options, 2) Complete Your Application, 3) Finance Your Studies, 4) Apply for Your Student Visa, and 5) Prepare for Your Departure. "Your 5 Steps to U.S. Study" is available online at <http://ow.ly/kUkDo> and as a 3-D avatar-guided Facebook app at <http://ow.ly/kP5ff>.

U.S. Study Abroad: EducationUSA advisers around the world are experts in understanding national education systems, and many have good relationships with local universities and schools. If you are considering establishing or expanding study abroad programs, contact an EducationUSA adviser in your target country to find out more about the information and services they may offer.

SERVICES FOR U.S. HIGHER EDUCATION INSTITUTIONS

As a global network, EducationUSA offers a variety of services to assist U.S. higher education institutions with international student recruitment. Institutions can develop international enrollment plans and reach students around the world with the help of EducationUSA. The EducationUSA website offers valuable resources to explore how the network can help recruit, enroll, connect and engage with international students.

RECRUIT AND ENROLL

The EducationUSA network offers expert insight on student mobility trends and recruitment opportunities from the field that is not generally available to the public. It provides access to resources and services designed to enhance international enrollment management strategies.

Research: Gain access to research and expertise on education systems and credentials, scholarship programs, and student mobility in countries around the world.

- Contact EducationUSA REACs and advisers, your on-the-ground experts.
- Investigate international student funding opportunities and special EducationUSA efforts, such as Opportunity, U.S. Student Achievers Program, Competitive College Clubs, and NeXXt Scholars.
- Consult the Open Doors Report on International Educational Exchange and this EducationUSA Global Guide for comprehensive data and analysis of student mobility trends.
- Turn to Country Fact Sheets and advising center pages for essential online admissions tools, including credential information and grading scales.

Make the Case: Find essential recommendations for an effective international enrollment management plan on campus.

- Communicate to your institution's leadership the value of international students to United States' public diplomacy.
- Enhance international student success on campus by providing essential student services.
- Tailor your institution's website for an international audience.

Raise Your Profile: Increase your institution's global visibility and outreach.

- Connect to the U.S. Department of State's global advising network by posting the EducationUSA logo on your institution's website.
- Interact with hundreds of thousands of prospective students through EducationUSA recruitment fairs and international events.
- Showcase your expertise by making presentations on EdUSA Connects webinars for students and advisers. EdUSA Connects webinars allow you to serve as an expert guest speaker on topics related to "Your 5 Steps to U.S. Study." You must have a login to serve as an expert. For more information about EdUSA Connects, visit: <http://ow.ly/kP512>.
- Send recruitment materials to advising centers worldwide.
- Announce financial aid and campus news to a global audience via the EducationUSA Weekly Update. The Weekly Update, distributed each Monday to the EducationUSA network, allows you to announce scholarships and other noteworthy news of particular interest to international students. EducationUSA advisers distribute the Weekly Update across social media channels and email lists, and post them in advising centers. They are also available to students through RSS feeds and a searchable web database. Each month, Weekly Update posts are clicked on more than 20,000 times across the world.
- Submit a YouTube video of your campus for inclusion on the EducationUSA TV channel playlists.
- Leverage state and regional consortia collaboration with the EducationUSA network to promote your institution to students abroad. EducationUSA supports 30 state and regional consortia that promote cities, states, and regions as destinations for international students. EducationUSA staff regularly attends and presents at consortia meetings. For information on forming a consortium or working with an EducationUSA representative, please contact Marty Bennett, EducationUSA Outreach Coordinator, at mbennett@iie.org.

Pre-Departure Information: Help incoming international students prepare for study in the United States.

- Find resources to help students understand the U.S. student visa process.
- Direct students to pre-departure orientations in their home countries.

CONNECT AND ENGAGE

In Person: Engage personally with EducationUSA advisers from around the world.

- Join U.S. higher education professionals and advisers from key markets overseas at the annual EducationUSA Forum in Washington, DC.
- Host EducationUSA advisers for visits and training programs on your campus. Ensuring that advisers have access to current information and skills-based training is essential to the success of the EducationUSA network. The following opportunities are available:
 - EducationUSA Training Institute (spring and fall): Each two-week EducationUSA Training Institute is comprised of a Washington, D.C.-based workshop—including sessions at the U.S. Department of State—and campus-based training. Further information including the application to host on-campus training for EducationUSA advisers is available online: <http://ow.ly/kP5uC>
 - Campus Visits/Higher Education Conferences: Experienced advisers represent EducationUSA at a variety of U.S. higher education association conferences each year. During their time in the United States, advisers have the opportunity to arrange individual or small group visits to colleges and universities in the geographic region where the respective conference is held.

- Offer to contribute to EducationUSA adviser training programs overseas.
- Connect with EducationUSA staff, REACs and advisers at over a dozen U.S. higher education association conferences and at international conferences.

Virtually: Engage virtually with the global EducationUSA advising network.

- Consult directly with EducationUSA REACs and advisers via email.
- Discuss international student recruitment topics at EdUSA Connects webinars.
- Keep abreast of comprehensive regional updates through EducationUSA newsletters and other online resources.
- Expand outreach through EducationUSA's virtual and social media channels.

FREE LOGIN ACCESS

The U.S. Higher Education section of the EducationUSA website helps institutions develop and refine their international student recruitment strategies. Bookmark the section at: <http://ow.ly/kUI8b>. Free logins are available at <http://ow.ly/kUkXB> for employees of U.S. postsecondary institutions and higher education associations listed with the Council for Higher Education Accreditation (CHEA). A login provides access to many of the benefits listed in the "Recruit and Enroll, and "Connect and Engage" sections.



SOCIAL MEDIA

Social media and other virtual tools have become indispensable in promoting U.S. higher education abroad, and in connecting U.S. institutions to prospective students. The EducationUSA network's social and virtual media channels allow institutions to reach students around the world.

As of early 2013, the cumulative social media impact of EducationUSA channels, pages, feeds, and blogs has expanded dramatically. Across the board, advising centers are embracing social media as an integral part of their advising activities.



Overall, the use of social media has become more widespread and sophisticated in the past year, moving from simple posts to more interactive content on a number of different levels. These numbers include sites beyond Facebook, Twitter, and YouTube that reflect other dominant social media platforms in a few select countries (e.g. Russian speaking nations use Vkontakte instead of Facebook, China prefers Sina Weibo and Youku to Twitter and YouTube).

Virtual Advising/Social Media: Some centers have been required to almost exclusively use virtual and social media tools for advising. The countries that rely completely on virtual and social media for advertising are Iran, Belarus, Syria, and China.

Trends: When comparing end-2011 to end-2012 numbers, the results are quite dramatic. There is a noticeable increase in the use of Twitter/micro-blogging and YouTube/video channels as part of the virtual outreach activities of EducationUSA Advising Centers.

Virtual Outreach of EducationUSA Advising Centers from 2011-2012

Platform/Marker	2011	2012	% Change
Facebook/social network page likes	291,732	828,163	174%
Facebook/social network pages	128	178	37%
Facebook group members	10,151	13,418	32%
Facebook groups	9	10	11%
Twitter/microblog followers	89,446	250,865	180%
Twitter/microblog feeds	73	103	41%
YouTube/video channel video views	248,034	812,931	228%
YouTube/video channels	11	45	309%

Additionally, more centers have moved away from Facebook groups as a primary social media means of attracting students to their center's activities, and instead are turning to Facebook pages for that purpose. Those groups that do exist tend to be for a more dedicated corps of student advisees as well as alumni now studying in the United States or working around the world. Blogs, especially in China, have also seen a dramatic rise in followers.

EducationUSA International Virtual College Fair: The 2012 EducationUSA International Virtual College Fair was an event held as part of international Education Week 2012. The 24-hour event drew 14,000 participants from around the globe and generated 37,000 visits to the booths of the 185 participating U.S. colleges and universities. The event was promoted widely by the EducationUSA network and multiple U.S. Department of State bureaus.

GLOBAL RECRUITING STRATEGIES

The following best practices apply globally for U.S. colleges and universities that recruit foreign students:

- Consult regional educational advising coordinators (REACs), the first point of contact for regional and country-specific advice.
- Ask REACs' advice about connecting with education ministries and scholarship-granting bodies in the region.
- Encourage prospective students to connect with EducationUSA advisers early in the application and college search process to save time and ensure accurate information.
- Demystify the U.S. application and admissions process by directing international students to "Your 5 Steps to U.S. Study" at <http://ow.ly/kUkDo>.
- Conduct market research to find regions or countries that fit your school's recruiting priorities. Take advantage of The Open Doors Report on International Educational Exchange and associated data tables, the regional information presented in this guide, and the EducationUSA Center and Country Fact Sheets available on our website.
- Visit EducationUSA Advising Centers to make a presentation and gain exposure. REACs and advisers can help maximize international recruiting trips. Contact the center in advance to arrange a meeting or school visit, present a group session, or attend a college fair.
- Encourage your international alumni to get involved with EducationUSA Advising Centers. Because word-of-mouth is an important factor in building institutional name recognition overseas, alumni can be excellent ambassadors. EducationUSA advisers can assist in setting up alumni presentations.
- Ask current students to promote their school. Recommend that your study abroad students intern or volunteer at EducationUSA Advising Centers to enhance your institution's visibility. On-campus students can also apply to the State Department's Virtual Student Foreign Service Program at <http://ow.ly/kUDKG> and share experiences through blogs, social media, or online projects. Current students can help build name recognition and familiarity.
- Hone your strategy for developing international institutional partnerships by consulting with EducationUSA advisers.
- Create recruitment strategies with both students and parents in mind. Family members often play an important role in the decision-making process.
- To maximize your travel budget, conduct digital video conferences, Skype meetings, webinars, or admissions interviews with students through EducationUSA Advising Centers.
- Participate in EducationUSA college fairs around the world to help expand your promotional reach.



REGIONAL EDUCATIONAL ADVISING COORDINATORS (REACS)

BRATISLAVA, SLOVAKIA
Christopher Medalis

AMMAN, JORDAN
Kristen Cammarata

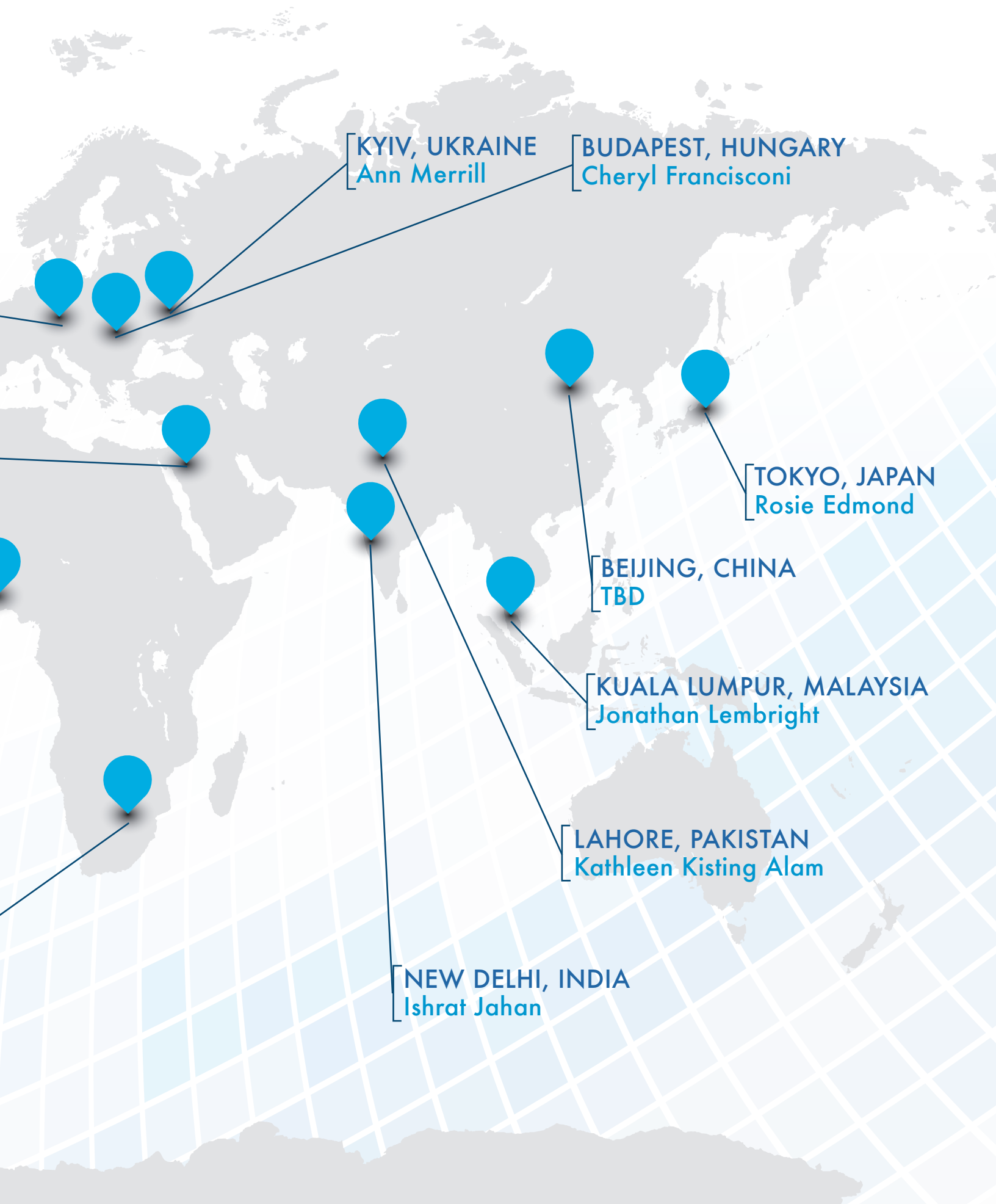
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Nancy Keteku

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Jonathan Lembright

[LAHORE, PAKISTAN
Kathleen Kisting Alam

[NEW DELHI, INDIA
Ishrat Jahan

EDUCATIONUSA ADVISING CENTERS: LEVELS OF SERVICE

EducationUSA Advising Centers in the EducationUSA network provide one of three levels of service: **Comprehensive**, **Standard**, and **Reference**. To find an advising center, visit www.educationusa.state.gov. For a complete list of services that may be offered at each center level, visit: <http://ow.ly/l6swR>.

	Reference	Standard	Comprehensive
Adviser & Center Capabilities			
Adhere to the EducationUSA Principles of Ethical Advising and guidelines on commission or incentive-based recruitment agents	•	•	•
Maintain an up-to-date library of reference books and materials	•	•	•
Offer hours of operation sufficient to meet local demand		•	•
Advisers proficient in English and their local language (if applicable)		•	•
Access video conferencing equipment		•	•
Display U.S. college and university-provided materials		•	•
Foster relationships with local high school counselors and university administrators		•	•
Advising staff with college degree (equivalent to U.S. bachelor's degree)			•
Computers with internet access for visitors			•
Services to Students			
Pre-departure information/orientations		•	•
Individual advising and information on financial aid		•	•
Organize general U.S. higher education orientation sessions, often featuring visiting U.S. representatives		•	•
Group advising			•
Provide virtual advising and consulting through email, social media, instant messenger, webinars, etc.			•
Services to U.S. Higher Education Representatives			
Brief visiting U.S. representatives on the local education system		•	•
Describe and compare U.S. and host country educational systems		•	•
Verify Ministry of Education recognition/certification of local high schools and universities		•	•
Participate in college fairs, hosting the EducationUSA booth		•	•
Organize and participate in alumni group activities and college fairs			•
Conduct outreach to local high schools and universities			•
Facilitate communication with local secondary and tertiary institutions			•
Organize public presentations for visiting U.S. representatives at off-site locations			•
Host visiting U.S. representatives for promotional presentations			•
Provides information on local government and foundation scholarships, and other financial aid			•

EDUCATIONUSA: BY THE NUMBERS

EducationUSA collects statistics to measure outreach to prospective students through center-based and outreach activities, and virtual and social media platforms. In calendar year 2012, EducationUSA made more than 6 million contacts in the areas listed.

In 2012, EducationUSA made 6,091,155 contacts.

In-Center	Total Contacts
Individual Appointments in Center	113,222
Advising by Phone	328,131
Advising by Email	491,294
EAC Group Attendees	168,325
Walk-ins / Library / Computer Users	327,034
U.S. Institution Representatives	7,607
Total:	1,435,613
Outreach	Total Participants
Education Fairs	865,898
American Corners / Centers	39,305
Local Universities / Secondary Schools	300,600
Other Fairs / Conferences / Seminars	73,739
Host Government Events	20,798
Embassy / Consulate Events	16,916
Public Locations	26,615
Other Activities	197,705
Total:	1,541,576
Social Media	Total Contacts
Social Networks - Page Likes, Group Members	828,163
Video / Video Channels Video Views	812,931
Skype Contacts - IM Advising Calls Made	14,378
Blog Follows	508,327
Twitter (Micro-Blog) Followers	133,535
Digital Video Conferences (DVCs) Participants	3,325
EdUSA Connects Session Attendees	9,990
Totals Social Media Contacts	2,310,649
Website Traffic	Total Contacts
Unique Website Visitors	803,317

SUB-SAHARAN AFRICA

Angola, Benin, Botswana, Burkina Faso, Burundi, Cameroon, Cape Verde, Central African Republic, Chad, Comoros, Congo Brazzaville, Congo Democratic Republic, Côte D'Ivoire, Djibouti, Equatorial Guinea, Eritrea, Ethiopia, Gabon, Gambia, Ghana, Guinea, Guinea Bissau, Kenya, Lesotho, Liberia, Madagascar, Malawi, Mali, Mauritania, Mauritius, Mozambique, Namibia, Niger, Nigeria, Reunion, Rwanda, Sao Tome and Principe, Senegal, Seychelles, Sierra Leone, Somalia, South Africa, South Sudan, St. Helena, Sudan, Swaziland, Tanzania, Togo, Uganda, Zambia, Zimbabwe

49 EducationUSA Advising Centers in the Region:

31	Comprehensive
10	Standard
8	Reference

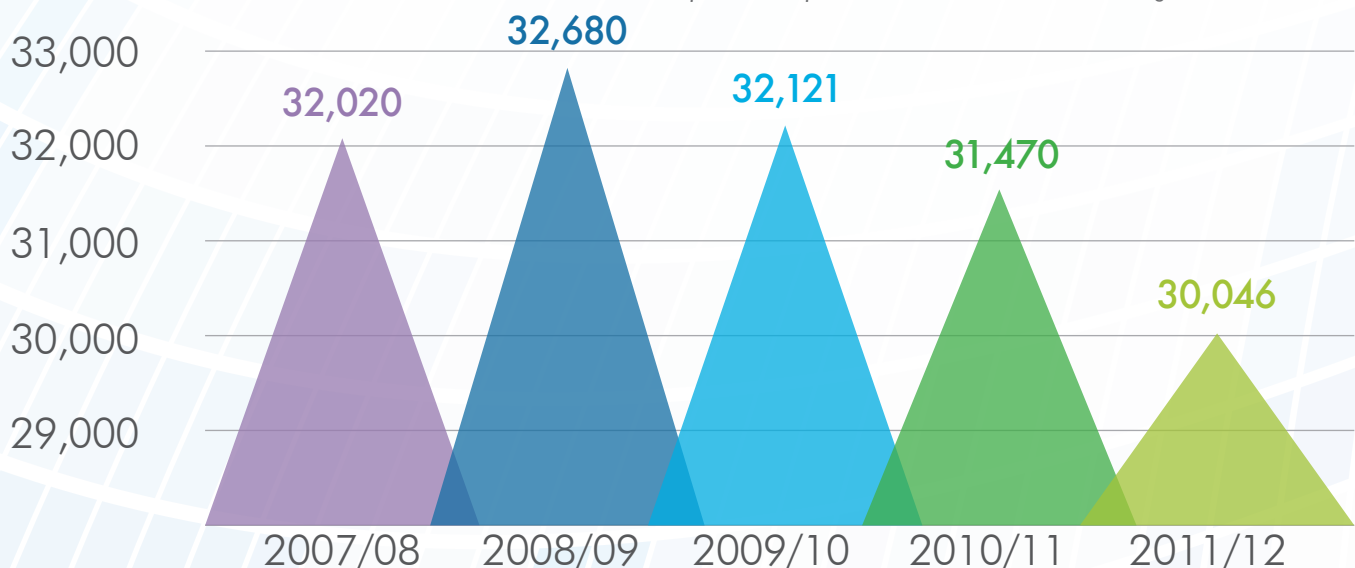
REGIONAL EDUCATIONUSA PROFILE

In sub-Saharan Africa, most EducationUSA Advising Centers are located in U.S. embassies and consulates. Our goal is to establish a presence in each of Africa's 49 independent nations, led by professional EducationUSA advisers who can guide undergraduate and graduate students through the admissions process and respond to inquiries from colleagues in the United States. Advisers can also facilitate university linkages and faculty exchange programs, joint research collaborations, sabbatical placements, and study abroad programs.

EducationUSA in sub-Saharan Africa is characterized by close personal relationships with students and their families and long-term bonds that carry through the entire cycle of students' educational experiences in the United States to their eventual return home. Centers integrate returned alumni into programs where they serve as the voice of experience. Intensive, transformational advising programs such as competitive college clubs and the United States Student Achievers Program (USAP), which are supported by Opportunity Funds in several countries, work to strengthen prospective students' competitiveness and broaden their horizons. African students who use EducationUSA services receive more than \$20 million in scholarships and financial aid each year.

Student Mobility (5-Year Trend)

Source: Institute of International Education, funded by a grant from the U.S. Department of State, Open Doors Report on International Educational Exchange, 2008-2012.





REGIONAL OVERVIEW

From Mauritania in the northwest to Mauritius in the southeast, sub-Saharan African countries are rapidly embracing the developments that accelerate interest in U.S. higher education: many Francophone and Lusophone countries now require English-language study, and some are adopting English as an official language.

Universities are expanding rapidly, particularly in the private sector, and are incorporating features such as modular course selection and semester calendars. The inauguration of specialized regional academic institutions such as the Pan-African University and Carnegie Mellon University's branch campus in Rwanda demonstrates that African higher education is moving forward. In addition, the integration of the Bologna License-Master-Doctorate (LMD) system opens access to global education systems.

A report from the African Network for Internationalization of Education (ANIE, <http://ow.ly/l6rDc>) cites significant developments:

- Rapid expansion of higher education, especially in numbers of students, institutions and their types, actors, and the diversity of academic programs.
- Increasing mobility of students across national boundaries, making African students among the most mobile in the world.
- The growing role of the English language in academic engagements, especially in countries that have been using other languages for scholarship.
- Gradually but steadily improved information and communication technologies, especially internet connectivity, which has changed how universities, students, and staff participate in internationalization.

- Growth of regional networks and programs supporting internationalization.
- Greater interest in and support of African higher education by international partners.
- Increasing intra-Africa initiatives, including centers of excellence, quality assurance frameworks, enhanced collaborations between universities, and attempts to harmonize academic programs.

Political and economic factors drive the progress of African student mobility as well: 20 African countries held elections in 2012, and 21 are scheduled to go to the polls in 2013. According to The Economist Group conference that convened February 5, 2013 in London:

- The continent's combined economies are predicted to grow at an average rate of 7% over the next two decades. This is more than China.
- The GDP of the largest 11 African countries are expected to be bigger than those of Russia and China by 2020.
- The rate of return on foreign investment is greater than in any other developing region.
- With Europe in crisis, the U.S. in decline and rapid investment from Asia, are we on the cusp of an African renaissance?

(Source: The Africa Summit, *Africa Unchained: The Next Generation*, <http://ow.ly/kP6J7>)

The International Monetary Fund (IMF) says the continent's 2013 GDP growth may nudge up to 5.7 percent. Further economic problems in the rich world could hit South Africa, but countries to its north are still likely to do well.

"A new research paper by two World Bank economists says that if Africa were one country it would already be "middle income," defined by the bank as having income per person of more than \$1,000. Africa's average is \$1,700. In sub-Saharan Africa, 22 countries have passed this admittedly still quite low middle-income threshold. Together, their population is 400 million; they include odd cases such as Angola and Sudan, which were both ravaged by years of bloodshed until recently and where inequality is rife.

"Wolfgang Fengler, one of the two World Bank economists, has identified four causes of Africa's economic rise.

1. The continent has the right kind of population growth: most Africans live increasingly longer while having fewer children, rather than the other way round. The UN says that Nigeria may overtake the United States by 2055 as the third-most-populous country after India and China, yet simultaneously reduce its birth rate.
2. Rapid urbanization is creating efficiency gains and luring investors to capital cities that have begun to thrive and where growing population density cuts transport times and fosters small-scale industrialization.
3. Technology is having a bigger effect on Africa than anywhere else, because it started from such a low base. In the past decade the use of telephones went from 0.7 percent of the population when land lines were rotten to 70 percent with the advent of mobile phones; Africa is a global pioneer in banking on mobile devices, not least since most people have no access to conventional banking.
4. Governance and economic management by officials have got better, again from very modest beginnings. The growing popularity of African sovereign debt is a good indicator. "If current trends continue, most of Africa will be middle-income by 2025," writes Fengler."

(Source: "Africa's Economy: Bulging in the Middle". The Economist. 20 Oct 2012

The Economist Intelligence, Global Forecasting Service's January 13, 2013 report adds that Sub-Saharan Africa's growth will be supported by a number of factors. Several of the oil-exporting countries in the region (including Angola, Cameroon, Chad, Equatorial Guinea and Ghana) will benefit from rising hydrocarbons output. New mining production in several countries (for example, Niger and Sierra Leone) will also be a positive factor for growth. Africa will also benefit from continuing strong Chinese investment inflows as the world's second-largest economy seeks to lock in the supplies of energy and natural resources required to meet its ambitious long-term development goals. Domestic demand, driven by urbanization and an emerging middle class, will also be an important factor supporting overall regional growth.

Regional Student Totals by Top 5 Countries of Origin

Country Name	2011/2012	% Change from 2010/11
Nigeria	7,028	-1.7%
Kenya	3,898	-16.5%
Ghana	2,769	-4.5%
South Africa	1,610	-3.5%
Cameroon	1,530	-7.8%

Five Countries of Origin (with over 100 students) with Highest Percentage Growth, International Students (5-Year Trend)

Country Name	2007/08	2011/12	% Change
Rwanda	270	465	72.2%
Equatorial Guinea	98	164	67.3%
Congo, Republic of the	150	249	66.0%
Angola	503	779	54.9%
Côte d'Ivoire/ Ivory Coast	711	955	34.3%

Source: Institute of International Education, funded by a grant from the U.S. Department of State, Open Doors Report on International Educational Exchange, 2008-2012.

72.2%

Rwanda has the largest percentage growth in the region over the last five years (with over 100 students)

RECENT TRENDS

- Rising political consciousness in several countries has led to dissatisfaction with government performance, prompting more widespread university strikes. This in turn motivates more parents to send their children abroad for university study. According to UNESCO, the United States is the leading destination for students from seven African countries (Eritrea, Ethiopia, Ghana, Kenya, Liberia, South Africa, and Tanzania) and the number two destination for 18 more.
- EducationUSA advisers in most African countries report rising interest in graduate study, as a graduate degree from the United States is considered a stepping-stone to professional success. Advisers are developing new programs to help students become competitive in graduate admissions, and welcome increased collaboration with graduate admissions offices in the United States.
- More students are learning English and taking English language exams at home before applying to universities in the United States; as a result, they are better prepared to enter degree programs directly. This saves money and increases their chances of visa issuance, which is a challenge in several countries.
- Although African higher education is expanding rapidly, the number of high school graduates has outpaced the enrollment capacity at local universities; only 20-30 percent of qualified students are able to gain admission. This drives students to seek education abroad and presents opportunities for U.S. institutions that look to diversify their student enrollment.

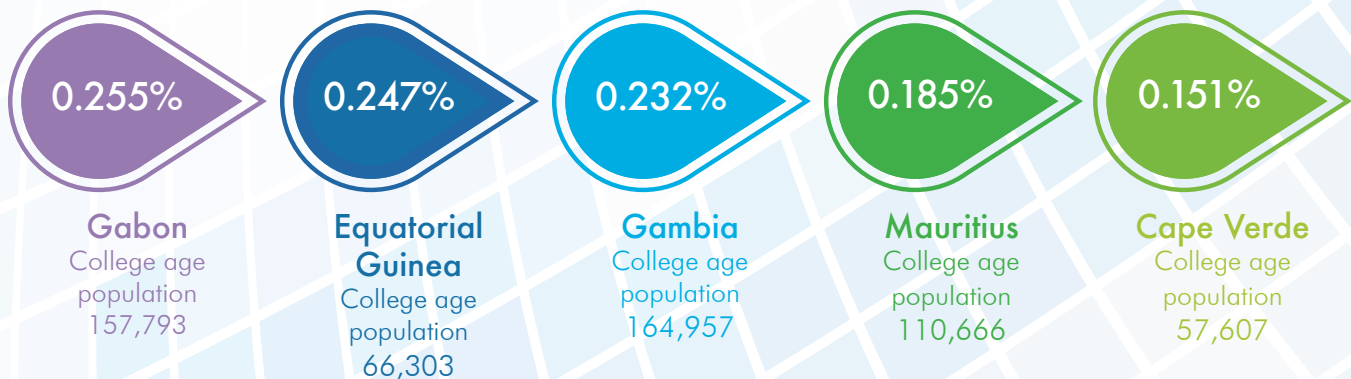
COUNTRIES IN THE SPOTLIGHT

- **Angola, Congo Brazzaville, Côte D'Ivoire, and Rwanda** achieved historically high enrollments in the United States. All are exciting markets for recruitment, having sustained high rates of growth for the last five years.
- In addition to the popular American student study destinations of **South Africa, Ghana, Kenya** and **Tanzania**, over the past five years **Botswana, Ethiopia, Malawi, Rwanda, and Zambia** are experiencing significant increases in study abroad numbers as U.S. students look for alternative study destinations.

WHAT TO EXPECT IN THE NEXT THREE TO FIVE YEARS

- Africa faces a huge increase in the number of high school graduates seeking admission to local higher education institutions that lack capacity in terms of facilities, instruction, and funding. In Ghana, Kenya, Malawi, and several Francophone countries, double the number of students will vie for university entrance because of structural changes or long strikes or political disruptions that resulted in a lost academic year. These developments represent a recruiting opportunity for U.S. colleges and universities.
- We are rapidly increasing the capacity of EducationUSA Advising Centers to guide students through competitive admissions processes, resulting in more well-qualified African students applying to study in the United States.

Five Countries of Origin with Highest Per Capita College-Age Student Mobility to the United States



Sources: UNESCO Institute for Statistics, Education Table 2 "Demographic and economic data"; School age population-Tertiary-Total for 2010, 2011, and 2012, available at <http://ow.ly/lbygL>. This chart excludes countries that had no data available or were not reported by UNESCO. Student totals from Open Doors 2012.

- More U.S. universities and foundations are awarding special scholarships for African students such as the MasterCard Foundation Scholars Program. Such scholarships will raise Africa's profile on U.S. campuses and attract more competitive students, while at the same time providing models for others to follow.
- Another encouraging development is linkages and "sandwich" programs that provide partnerships for faculty development, which is desperately needed in African higher education. The Regional Institute for Population Studies, a United Nations University program based at the University of Ghana, sends Ph.D. candidates to Pennsylvania State University for one year; the University of California Exchange generates reciprocal funding for African students to spend a year in lab research in California. The University of Michigan has embarked on an initiative to increase the admission of Ph.D. candidates directly from undergraduate universities in Africa.
- We are exploring the feasibility of an EducationUSA Africa college tour and fair that will visit a combination of popular and up and coming destinations.

FOREIGN GOVERNMENT AND PRIVATE FUNDING

Angola, Botswana, Ghana, Mauritius, Nigeria, and Rwanda offer government scholarships on a limited scale. Scholarships in Angola, Ghana, and Nigeria are centered on the oil industry. The Rwanda Presidential Scholars

program works with a group of 19 U.S. institutions. The Mauritius scholarship program benefits top-ranking students in the national exams. Contact EducationUSA advisers for details.

VIRTUAL AND SOCIAL MEDIA USAGE

- Students in every African country report that Facebook is the first place they go when they are online. Almost all EducationUSA Advising Centers in the region have Facebook pages or groups. We encourage U.S. colleagues to join our EducationUSA Africa closed Facebook group, where African higher education news and student success stories are posted.
- EducationUSA Advising Centers located in U.S. embassies all have digital video conferencing (DVC) capacity and are eager to set up group programs. Skype works well in most countries and is especially effective to set up discussions between students on your campus from a particular country and an EducationUSA Advising Center, as this rapidly increases applications.
- The EdUSA Connects platform works in most countries, but many are challenged by limited bandwidth.
- Google is very active in Africa, setting up offices that deal with individual countries' IT aspirations. At the same time, high-speed cabling is spreading across the continent.

In calendar year 2012, EducationUSA in Sub-Saharan Africa made 420,479 contacts.



213,893 contacts made through advising centers

Advising Center-based Contacts	212,748
U.S. Institution Representative Visits	1,045

188,800 contacts made through outreach activities

Education Fairs	95,420
American Corners / Centers	7,846
Local Universities / Secondary Schools	59,062
Other Fairs / Conferences / Seminars	8,362
Host Government Events	525
Embassy / Consulate Events	3,219
Public Locations	8,362
Other Activities	8,298

15,592 contacts made through virtual platforms*

Social Media Platforms	15,107
Webinars / DVCs	485

* Includes social network page likes, profile friends, or group members; video views; Skype contacts; blog and mini-blog followers; digital video conference participants; and EdUSA Connects webinar participants.

- Four out of five Africans use SMS messaging; lower-cost feature and smart phones now being introduced will accelerate the switch to more advanced technology. A mobile strategy should include SMS and feature phones to reach most of your prospective students.

SUCCESSFUL RECRUITING STRATEGIES

In 2012, more than 50 institutions came to meet students in person at EducationUSA centers. EducationUSA advisers jump at the opportunity to arrange visits, including scheduling fairs and school/university visits, hotels and local transport, and briefings on local educational systems.

- Offer scholarships and financial aid. An effective way of enabling African students to enroll at your institution is to combine smaller scholarships with a few full awards.
- Avoid broad assumptions about fraud or finances. Work with EducationUSA advisers who can help verify academic and financial documents.
- Focus on institutional partnerships, sister-city agreements, alumni networks, historical ties, and research connections.
- Explain fees and financial aid in detail, and provide alternatives to credit card payments whenever possible, because many African countries either don't have or cannot use credit cards.
- Recruit through alumni who have returned to their home countries, and study abroad students in-country, to represent you.
- Recruit through EducationUSA, as African students and parents are often suspicious of local commercial agencies.
- Join the EducationUSA Africa Facebook group, where African higher education news and student success stories are posted.

- Utilize the digital video conferencing (DVC) capacity available at U.S. embassies. It is especially effective to set up DVC or Skype discussions between students from a particular country or sub-region on your campus and at an EducationUSA Advising Center, as this rapidly increases applications.

REGIONAL EDUCATIONUSA EVENTS

Use the EducationUSA website to find country-specific information about upcoming fairs, webinars, and other events and activities. Several EducationUSA Advising Centers are planning local events during the year.

FAIRS AND CONFERENCES

In addition to the many in-person student recruitment opportunities offered through participation in EducationUSA fairs and conferences, representatives of U.S. institutions often also capitalize on these events to receive a country briefing from EducationUSA advisers, meet with U.S. embassy public affairs and consular staff (subject to scheduling availability), make a presentation at an EducationUSA Advising Center, or visit a local high school or college. Contact the EducationUSA staff organizing the event to explore options for maximizing the impact of your participation.

- **Nigeria:** 14th annual EducationUSA College Fair, early October, in Lagos and Abuja. This event attracts more than a dozen U.S. higher education institutions, and incorporates alumni representatives.
- **Niger:** EducationUSA College Fair, early October.
- **Malawi:** EducationUSA Mini College Fairs, May and September.
- **Zimbabwe:** EducationUSA Annual College Fair, July.
- **South Africa, Swaziland, Botswana, Zambia,**



Ethiopia, Tanzania, Kenya, and Ghana: Annual CIS Africa tour, October/November.

- **Senegal:** Career Forum, February.
- **Kenya:** Annual Education Exhibition, March.

CENTER EVENTS

Stay connected to the EducationUSA Africa closed group on Facebook (<http://ow.ly/kP82s>) and check center pages on the EducationUSA website for the latest announcements of special programs at our advising centers. Contact advisers if you are interested in setting up programs online.

BEST TIMES OF YEAR TO INTERACT WITH STUDENTS

EducationUSA Advisers will work with you to make your visit a success. EducationUSA recommends visiting during the following months:

- **West Africa:** June to mid-July, October–November, January–March
- **Southern Africa:** February–May, July–August
- **East Africa:** March–June, October–November
- **Sudan:** January–April
- **Malawi:** May–August
- **Zimbabwe:** May–July, September

(The least productive times to connect are during Ramadan, Easter, Christmas, and exam periods: May–June and November–December.)

U.S. STUDY ABROAD IN THE REGION

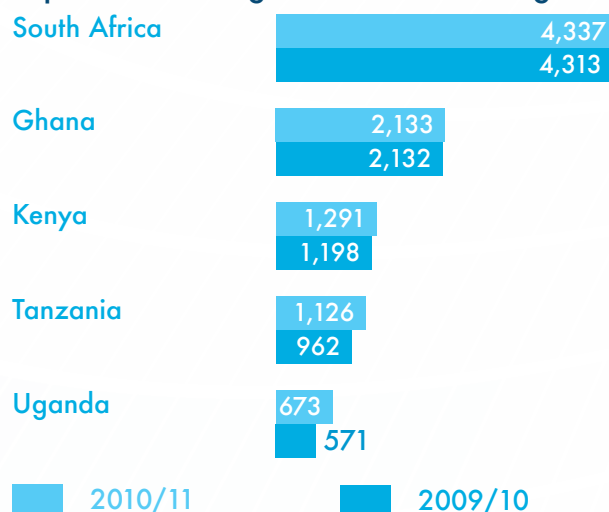
Africa is an increasingly popular destination for American students, recording 11,878 students in 2010/11 a four percent increase from the previous year (Open Doors, 2012). South Africa is by far the biggest draw, hosting 4,337 Americans; Ghana follows with 2,133.

Kenya, Tanzania, Uganda, Senegal, and Botswana are also major partners in study abroad programs. EducationUSA advisers can help facilitate study abroad programs, and they welcome American interns in their centers.

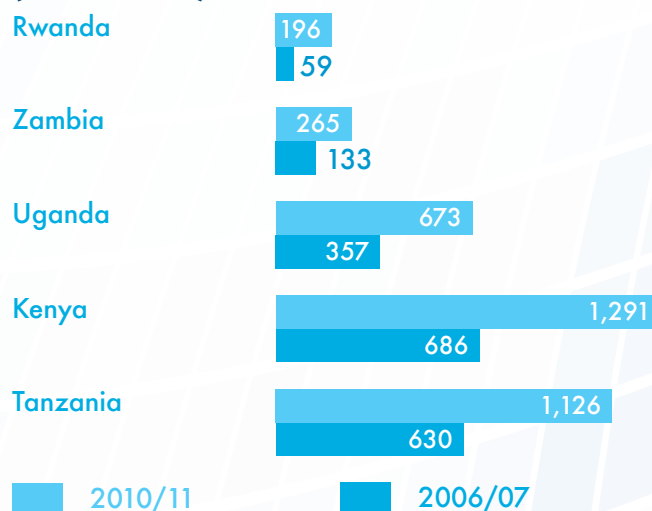
↑↑↑ 232.2%

Rwanda has one of the highest growth rates for receiving U.S. students

Top Five Receiving Countries in the Region



Five Countries (with over 100 students) with Highest Percentage Growth, U.S. Students (5-Year Trend)



Source: Institute of International Education, funded by a grant from the U.S. Department of State, Open Doors Report on International Educational Exchange, 2008-2012.



EAST ASIA AND PACIFIC

Australia, Brunei, Burma, Cambodia, Mainland China, Federated States of Fiji, Hong Kong and Macau, Indonesia, Japan, Laos, Malaysia, Marshall Islands, Micronesia, Mongolia, New Zealand, Palau, Papua New Guinea, Philippines, Singapore, South Korea, Taiwan, Thailand, Timor-Leste, Tonga, Vietnam

**59 EducationUSA
Advising Centers
in the Region:**

22 Comprehensive
30 Standard
7 Reference

REGIONAL EDUCATIONUSA PROFILE

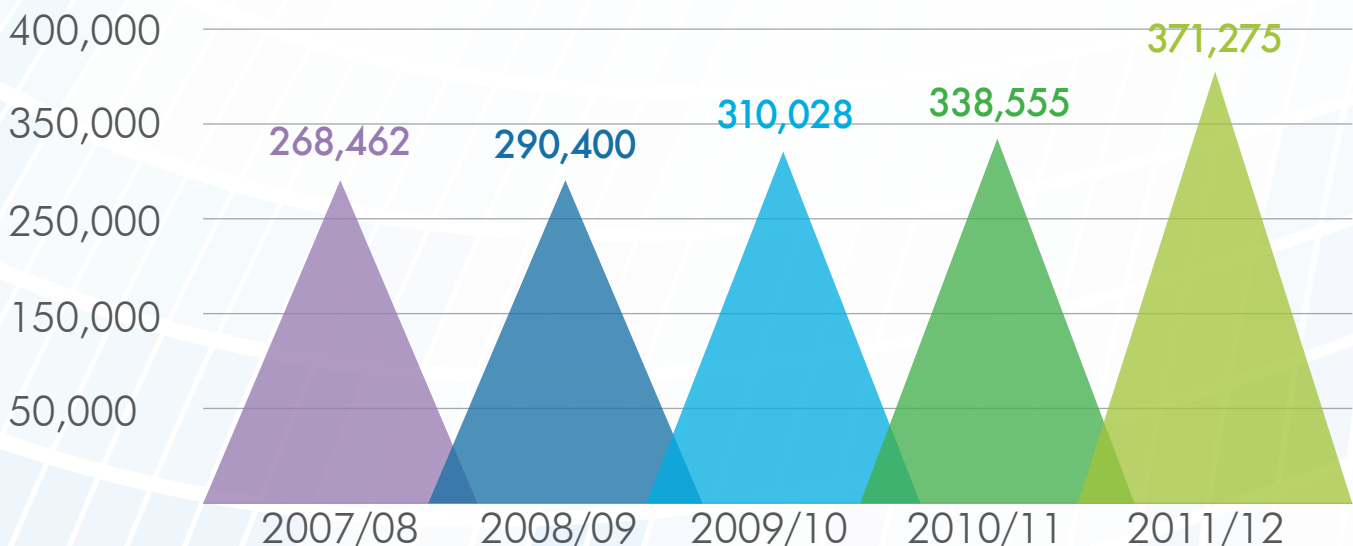
EducationUSA Advising Centers in East Asia and Pacific (EAP) are as varied as their geographic region. As the trusted source of information on studying in the United States, EducationUSA Advising Centers are located in embassies, consulates, Fulbright Commissions, and American Spaces when a strong identification with the U.S. government is beneficial. Where a more local profile is preferred, EducationUSA Advising Centers partner with municipalities and NGOs.

Integral to the region is the robust online advising that takes place through social media, purpose-built websites, and SMS. Advising centers in Japan, Indonesia, and Mainland China are keen on using technology to reach students, while more personalized attention is common in Australia, Malaysia, and Taiwan. Also integral to the region is nascent “media advising” which leverages local and national media throughout the EAP region to reach the widest possible audience.

Throughout the region, centers stress the American cultural value of “Do It Yourself” to students, i.e., choose your own school, write your own application, sit for your own tests, solicit letters of reference from those who know you, and submit authentic transcripts. EducationUSA centers in EAP provide the tools, resources, and guidance that students and their parents need to feel confident in embracing academic integrity, which will prepare them well for their years ahead.

Student Mobility (5-Year Trend)

Source: Institute of International Education, funded by a grant from the U.S. Department of State, Open Doors Report on International Educational Exchange, 2008-2012.





REGIONAL OVERVIEW

Spanning the largest geographic region, East Asia and Pacific (EAP) is perhaps the most diverse of all regions. Ranging from the mountains of Mongolia, to the temples of Laos, to the sandy beaches of Samoa, East Asia and Pacific regional education advising coordinators (REACs) and advisers are your guides to understanding the region's vast education landscapes.

EAP spans a wide range of religions, languages, and countries, and includes many of the top places of origin for international students in the United States. While the global number of international students traveling to the United States for study increased by six percent from 2011 to 2012, the EAP region experienced a higher growth rate, at 10 percent. This brings the total sending population of EAP to 371,275, which accounts for nearly half (more than 48 percent) of all international students in the United States (Open Doors, 2012).

RECENT TRENDS

- Over the past five years, the EAP region has averaged more than seven percent annual growth in student numbers to the United States. This growth is expected to continue due to positive economic indicators and ongoing interest in international education. However, as competition increases and destinations in East Asia and Pacific continue to vie for market share over traditional destinations, U.S. institutions have both a challenge and an opportunity to meet the growing demand for quality higher education for the region's quickly expanding middle class.
- The U.S. and Japanese governments are partnering to increase student mobility numbers between the two countries. This renewed collaborative effort comes in response to the continued decline in Japanese student mobility to the United States, which is largely due to a dramatic drop in population, coupled with a high capacity to meet educational demands at domestic institutions in Japan. From 2010/11 to 2011/12, the number of students from Japan studying abroad declined by 6.2 percent (Open Doors, 2012).
- Australia, the top destination for Southeast Asian students studying abroad, experienced substantial decreases in the number of students from the region over the past year. This was due in large part to changes in Australian immigration policy, the strong Australian dollar in comparison to other currencies, and the increased success of local programs enticing students to remain in-country.
- Two major factors seem to be sustaining Chinese interest in pursuing an education. First, due to the severe competition of the Gao Kao (National College Entrance Examination), more families turn to overseas universities as a viable and less stressful option for their children. Second, Chinese students continue to show interest in living abroad, and the United States remains the most popular destination. As a result, China was the top place of origin of international students in the United States in 2011/12 for the third year in a row. Close to 195,000 students studied in the United States in 2011/12, reflecting a 23.1 percent increase from the previous year's total (Open Doors, 2012).
- The United States is a leading destination of overseas study as parents and students consider it home to top universities.

- **Taiwan:** The U.S. is still the top study abroad destination for Taiwanese students. According to Taiwan's Ministry of Education, 33,811 Taiwanese students studied abroad in the 2010-2011 academic year: 46.9 percent in the United States, 10.72 percent in Australia, 10.65 percent in the United Kingdom, 9.6 percent in Japan, and 8.31 percent in Canada. Almost half of all Taiwanese students who studied abroad chose the United States as a study abroad destination.
- In terms of macro trends impacting student mobility in Southeast Asia, significant foreign commercial interest has heightened in the mainland part of the sub-region (Burma, Cambodia, Laos, Thailand, and Vietnam). This is due to current and projected economic growth tied to natural resource development and increasingly favorable policy regarding trade and investment. Rapid GDP growth and the resulting middle class expansion is an important indicator for growth of the international student market in the region.
- Over the past five years the Southeast Asia sub-region has averaged five percent annual growth in students leaving to study in the United States. The current total of 46,063 represents a 23 percent market share of the total number pursuing higher education outside their home country for (UNESCO, 2012) – the United States is the second most popular destination behind Australia.

COUNTRIES IN THE SPOTLIGHT

- **South Korea:** South Korean student numbers increased 1.7 percent, and the country ranks as the third-largest sending country, with 73,351 U.S. enrollments. Enrollments are driven by strong ties to the United States and demand for English proficiency during a stage of rapid economic development. U.S. higher education offers attractive academic programs that support South Korea's thriving semiconductor, telecommunications, and automotive export industries. For these fields, students particularly seek programs in business, English, engineering, law and computer science.
- **Hong Kong:** Hong Kong has been experiencing capacity issues at its universities. Only 20 percent of high school graduates can enter UGC-funded (public) universities. The remaining 80 percent of graduates will either study overseas or opt for alternative further study options in Hong Kong. Additionally, due to an increased demand for a highly skilled and knowledgeable workforce in a wide array of fields, many Hong Kong university graduates will pursue graduate degrees.

Regional Student Totals by Top 5 Countries of Origin

Country Name	2011/2012	% Change from 2010/11
China, People's Rep. of	194,029	23.1%
South Korea	72,295	-1.4%
Taiwan	23,250	-6.3%
Japan	19,966	-6.2%
Vietnam	15,572	4.6%

Five Countries of Origin (with over 100 students) with Highest Percentage Growth, International Students (5-Year Trend)

Country Name	2007/08	2011/12	% Change
China, People's Rep. of	81,127	194,029	139.2%
Vietnam	8,769	15,572	77.6%
Myanmar/Burma	604	807	33.6%
Australia	3,088	3,848	24.6%
Malaysia	5,428	6,743	24.2%

Source: Institute of International Education, funded by a grant from the U.S. Department of State, Open Doors Report on International Educational Exchange, 2008-2012.

139.2%

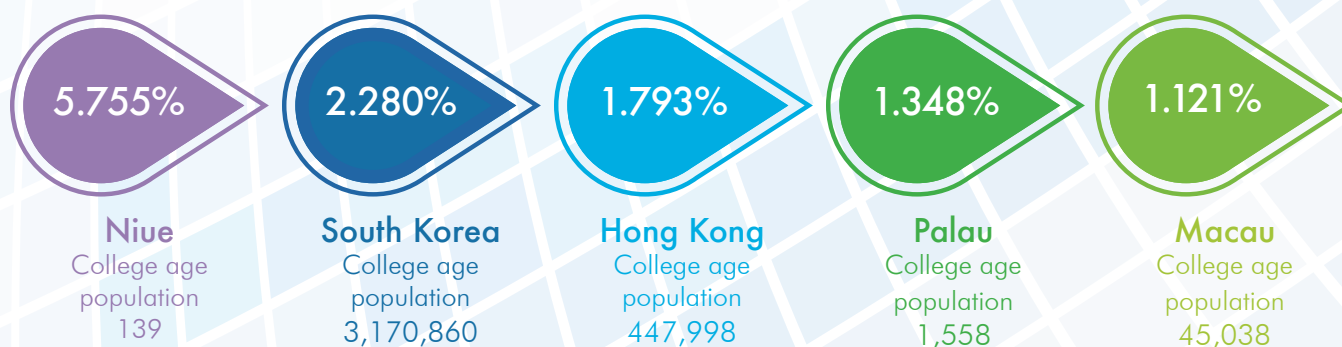
The People's Republic of China has the largest percentage growth in the region over the last five years (with over 100 students)

- **Mongolia:** The Mongolian government plans to realign its education system to the needs of a market economy by enhancing the quality of skilled workers and facilitating access for the poor and disadvantaged to all levels of education. According to IIE's most recent Open Doors report, 1,227 Mongolian students studied in the United States in 2011/2012. Of this total, 67.2 percent studied at the undergraduate level, 18.1 percent studied at the graduate level, and 7.1 percent were enrolled in OPT or non-degree programs. In the last few years, Mongolian students have shown an increased interest in studying business, finance and law in the United States. The State Training Fund indicates that the Mongolian government has spent approximately 5.3 million Mongolian tugriks to support study abroad students in 2010-2011. Among the population of Mongolian students studying overseas, 45 percent studied in the United States.
- **Taiwan:** Taiwan ranks as the sixth source of international students in the United States. 23,250 Taiwanese students studied in the U.S. during the 2011/12 academic year. Around 50 percent of Taiwanese students in the United States studied at the graduate level, 25 percent at studied at the undergraduate level, and another 25 percent completed OPT or non-degree programs. The top three fields of study for Taiwanese students are business, engineering, and design. A very high percentage of faculty members from Taiwanese universities received Ph.D.'s in the United States.
- **Burma:** Historically overlooked in the past, Burma is now in the spotlight in terms of U.S. university engagement. EducationUSA's first ever university fair was held in Rangoon in early 2013, followed by an IIE-led delegation of U.S. institutions focused on building partnerships with local universities. Over the past five years, Burma has experienced a steady growth in the number of students studying in the United States (6 percent annually) and these numbers are expected to continue growing.
- **Indonesia:** 2012 marked the highest growth in students studying in the U.S. since 2008 and the highest number ever of U.S. students studying in Indonesia. The country continues to exhibit high growth potential for U.S. recruiters given its status as the largest regional economy and world's fourth largest population, a sizable middle-class citizenry, and a strong network of quality schools and students.
- **Vietnam:** The country continues to post historic growth by averaging annual student increases of more than 20 percent over the past ten years. In addition to being the eighth leading country of origin of international students in the U.S., Vietnam is also the world's third largest source of international students at U.S. community colleges. These numbers are expected to continue to grow along with the rapidly expanding economy and the continued demand for education by a young population (45 percent under the age of 25).

WHAT TO EXPECT IN THE NEXT THREE TO FIVE YEARS

- Growth in the region is expected to continue as the regional GDP remains strong and the long-term devaluation trend of the U.S. dollar presents a compelling incentive for students to study in the United States. Notable increases are expected in undergraduate non-STEM fields.
- Australia and the United Kingdom will continue to be top competitors for the United States, while Japan, Malaysia, Singapore, and China will increasingly compete for students from the region.
- While the number of Asia-regional education hubs is expected to grow significantly over the next five to 10 years, both the rate of adoption and capacity for engagement in international education are not likely to be as rapid or as high as local governments are predicting.

Five Countries of Origin with Highest Per Capita College-Age Student Mobility to the United States



Sources: UNESCO Institute for Statistics, Education Table 2 "Demographic and economic data"; School age population-Tertiary-Total for 2010, 2011, and 2012, available at <http://ow.ly/lbygL>. This chart excludes countries that had no data available or were not reported by UNESCO. Student totals from Open Doors 2012.

- In some parts of the region, local providers and governments are incentivizing institutional partnerships that will build institutional capacity in teaching and research.
- The Japanese private sector is putting pressure on Japanese universities to provide global graduates. As a result, we anticipate an increase in partnerships and more courses in English to attract more English-speaking students who will help to internationalize domestic campuses. The anticipated “gap year” that will result from the changes that the University of Tokyo is making to its academic year will provide opportunities for U.S. institutions to build programs that will attract affected students.
- Traditionally a source for enrollments from Australia and New Zealand, the Pacific is likely to become more of a focal point for international student recruitment in the United States, given new opportunities for economic trade and that the area receives much U.S. foreign assistance.
- Undergraduate programs are likely to attract the strongest interest among students in the Pacific, but the recently reinstated Fulbright Scholarship program in the sub-region is also attracting more graduate students.
- The Pacific is a prime market for community colleges. Many students in the region are unable to afford tuition at a four-year institution. Trade and short-term programs will continue to be in higher demand than four-year degrees. Promoting 2+2 programs in the Pacific is recommended.
- The Mongolian economy is growing fast, as is the level of English language proficiency among Mongolian students. As a result, the number of Mongolian students financially able and academically prepared to study in the U.S. will increase in coming years. Top fields of study include engineering, technology, natural sciences, teaching and agriculture. The Mongolian government has indicated an interest in providing financial support for study in these areas.
- ASEAN Economic Integration in 2015 is expected to enhance the Southeast Asia international student recruitment market by facilitating greater English proficiency and increasing regional purchasing power through the expansion of the middle class.
- There will be increased competition from regional education hubs in Malaysia, Singapore, China, and Australia. This will coincide with a diversification of low cost offshore degree offerings, e.g., English medium degree programs offered by Chinese universities in Thailand.

FOREIGN GOVERNMENT AND PRIVATE FUNDING

- **South Korea:** The National Institute for International Education selects 70 South Korean students annually to study degree programs abroad. Financial support of up to \$31,000 per year is provided for the first few years of study.

In calendar year 2012, EducationUSA in East Asia and Pacific made 950,008 contacts.



125,624 contacts made through advising centers		130,251 contacts made through outreach activities		694,133 contacts made through virtual platforms*	
Advising Center-based Contacts	124,327	Education Fairs	43,247	Social Media Platforms	691,492
U.S. Institution Representative Visits	1,297	American Corners / Centers	5,266	Webinars / DVCs	2,641
		Local Universities / Secondary Schools	50,734		
		Other Fairs / Conferences / Seminars	16,534		
		Host Government Events	2,558		
		Embassy / Consulate Events	1,728		
		Public Locations	2,912		
		Other Activities	7,272		

* Includes social network page likes, profile friends, or group members; video views; Skype contacts; blog and mini-blog followers; digital video conference participants; and EdUSA Connects webinar participants.

- **Japan:** The Japan International Cooperation Agency (JICA) scholarship program provides funding and a living allowance to Japanese students for short-term graduate thesis research overseas in a country or region relevant to their academic area of study. The Japan Student Services Organization (JASSO) offers scholarships to foreign students seeking short- and long-term study abroad programs in Japan. Qualified applicants must demonstrate financial need and be enrolled in a foreign institution and admitted to a Japanese college or university study abroad program. Lastly, the Japan Society for the Promotion of Science (JSPS) Fellowship is designed to promote international scientific cooperation by funding foreign students' joint research activities with colleagues at Japanese institutions and research institutes.
- **Australia:** Endeavour Research Fellowships provide financial support for Australian postgraduate and postdoctoral students for short-term research in the Asia-Pacific region, the Americas (including the United States), Europe, and the Middle East.
- **China:** EducationUSA China supports President Obama's 100,000 Strong Initiative, a national effort designed to dramatically increase the number and diversify the composition of U.S. students studying in China. The 100,000 Strong Foundation seeks to prepare the next generation of American experts on China who will navigate the growing political, economic, and cultural ties between the United States and China. The foundation also develops opportunities and funding for underrepresented students to study in China.
- **Hong Kong:** The Sir Edward Youde Memorial Fellowships aim at financing outstanding Hong Kong students for overseas postgraduate studies. Learn more at <http://ow.ly/kP8CU>.

The American Chamber of Commerce in Hong Kong U.S. Studies Scholarship is available to a qualified secondary school graduate of Hong Kong to pursue studies at a U.S. university. Learn more at <http://ow.ly/kP94X>.
- **Mongolia:** The Mongolian Ministry of Education and Science (MES) offers scholarships for undergraduate students who participated successfully in International Olympiads in environmental sciences, physics, mathematics and chemistry. MES also offers government loans for undergraduate students who are studying in their sophomore and junior years at U.S. schools. For graduate students, MES offers government loans if a student is admitted in one of the world's top 500 schools, including colleges and universities in the United States, the United Kingdom, Australia, and Japan.
- **Taiwan:** Taiwan's Ministry of Education provides government study abroad scholarships for master's and

Ph.D. degree-seeking Taiwan students. Learn more at <http://ow.ly/kRj3x>. The Taipei City Government also offers government loans for students who are studying in accredited master's programs, Ph.D. Degree programs, and professional certificate programs. Learn more at goo.gl/OefqZ. The National Science Council provides the "Elite Study Abroad Program" for academic or research-oriented Taiwan students. Learn more at <http://ow.ly/kP9Ta>.

- **Vietnam:** Government-sponsored training of university faculty and government officials is available via two primary initiatives:
 - Project 165 (<http://ow.ly/kPcuc>) sponsors 1,500 government officials at overseas universities for graduate level training through 2015.
 - Project 911 (<http://ow.ly/kPcD1>) sponsors 10,000 university faculty for doctoral-level study at overseas universities through 2020.

Project 911 sponsors
10,000
university faculty for
doctoral-level study at
overseas universities
through 2020

- **Malaysia:** The Public Service Department of Malaysia offers scholarships for both undergraduate and graduate study abroad with a focus on the critical fields of medicine, dentistry, pharmacy, veterinary medicine, engineering, and science and technology. Learn more at <http://ow.ly/kPcW1>. In addition, PETRONAS offers a comprehensive list of scholarships. Learn more at <http://ow.ly/kPdfp>.
- **Indonesia:** There are a number of notable national and provincial scholarships available for overseas study. The Ministry of National Education (DIKTI) awards approximately 1,000 scholarships per year for graduate study by university faculty. Learn more at www.beasiswa.dikti.go.id. In addition, the Ministry of Trade (<http://ow.ly/kUzaH>) awarded 21 U.S. scholarships in 2013, while the Papua Provincial Government (<http://ow.ly/kUzg6>) has launched their "1000 Ph.Ds." initiative. The following government agencies also offer scholarships for graduate training: The Ministry of Foreign Affairs (<http://ow.ly/kUAMV>), the Ministry of Communication and Informatics (<http://ow.ly/kUAFh>), and the National Development Planning Agency (<http://ow.ly/kUAo7>).

VIRTUAL AND SOCIAL MEDIA USAGE

- **Japan and South Korea:** Popular platforms in Japan include Mixi, Mobage-town, Gree, Facebook, and Twitter. Popular platforms in South Korea include Cyworld, MeToday, Facebook, Twitter, and LinkedIn. Mobile 3G penetration in Japan and South Korea stand at 95 percent and 80 percent of the market, respectively. The vast majority of social networks are accessed via smartphone applications and mobile technology in these countries.
- **Australia, New Zealand, and the Pacific Islands:** Facebook and Twitter users dominate these markets; however, Bebo remains a popular social networking site. Internet usage across the Pacific Island nations remains relatively low. Fiji and Micronesia lead in total market penetration at just under 15 percent, while islands such as Papua New Guinea, the Marshall Islands, Tonga, and Kiribati hover around five percent. In Australia and New Zealand, 3G penetration is now at 58 percent and 44 percent, respectively. Social networking via the internet is still common, although smartphone and mobile technology is emerging.
- **Mainland China:** According to a CNNIC (China National Network Information Center) report released on January 19, 2011, at the end of 2010 there were 457 million internet users in China, and 303 million of them (66.2 percent) accessed the internet through cell phones. The Chinese are heavy users of the internet and mobile phones. Each day more than three million messages via bulletin board systems (BBS), news, commentary, and blogs are posted. (Source: Boston Consulting Group, "The Internet's New Billion," September 2010.)
- **Hong Kong:** Hong Kong's fixed broadband penetration rate is among the highest in the world. According to Internet World Stats and Digital Jungle, by December 2012 the online population was more than five million, which represented an Internet penetration of 74.5 percent for the Hong Kong population. The most influential social networking site in Hong Kong is Facebook. There are more than four million of Facebook users, which makes it 42nd in the ranking of all Facebook statistics by country. YouTube and Instagram are also popular among young citizens for entertainment purposes. Unlike the United States, there is lack of young Skype and Twitter users. Despite internet penetration of 74.5 percent in Hong Kong, and the existence of social networking sites, the people of Hong Kong have yet to change their use of social media channels beyond using them to keep in touch with friends. Therefore, personalized attention is still needed in order to reach students. Investing in a physical presence to build trust is therefore crucial in this country.
- **Mongolia:** Most Mongolian young people use all types of social media (websites, Facebook, Twitter, and MSN). Wireless technologies have had greater success and mobile phones are becoming increasingly common, even in rural areas. Internet usage has grown rapidly in the last few years and dial-up, wireless, 3G or internet modems are commonly used with smartphones or notebooks. Especially in the countryside, the government prefers an installation of cell phone based stations over laying land lines, as cell phone based stations are easier to install.
- **Taiwan:** The Taiwanese are tech savvy, with internet penetration at 75 percent. Approximately 32 percent of mobile phone customers use smartphones, social media and internet technology which are crucial tools for attracting Taiwanese students.
- **Southeast Asia:** The most effective medium of communication in the region continues to be email, with social media gaining continued prominence. Sites such as Facebook and Twitter are commonly used, but it should be noted that accessing the internet via mobile phone is more prevalent than doing so on a traditional computer. As such, "mobile ready" website content should be a key component of a social media strategy for the region (and may be seen as better investment than tablet or mobile phone apps). In addition, there is increased participation in webinars and virtual college fairs. However virtual advising/counseling does present a challenge as decision-making is family-centered and parents typically expect personal/in-person advising.

SUCCESSFUL RECRUITING STRATEGIES

- Focus on the familiar, e.g., sister-city agreements and immigrant ties. Students in EAP often look to success stories from their peers for added guidance during the decision-making process, so alumni are an excellent way to connect with advising centers and students across the region.
- Create recruitment strategies with both students and parents in mind.
- Create information in the local language, which can help satisfy the need for parental support.
- At the graduate level, publicize the possibility of getting a research or teaching assistantship. This is a major factor in the decision to apply and enroll at a U.S. university.
- Consider joint marketing with other like-minded U.S. institutions.
- Develop attractive and easy-to-navigate "mobile-ready" websites.

- Invest in physical presence to build trust. Visit and present at local high schools, colleges, and EducationUSA centers, and attend EducationUSA and other reputable recruitment fair events.
- Establish and utilize partnerships. Develop agreements with community colleges to facilitate transfer students and highlight the cost-saving dimensions of such arrangements.
- Promote sports scholarships to athletically gifted students.
- Host in-person and virtual sessions for parents to help them demystify the process of applying to the study in the United States, to allay their fears, and to share with them the richness of U.S. campus life prior to departure.
- Connect your alumni living in the region with the nearest EducationUSA Advising Center and capitalize on opportunities for them to represent your institution.
- Develop financial aid programs, which are proven tools for recruitment, and can also be useful for longer-term institutional brand-building.
- Incorporate effective “institutional champions”, i.e., using young student interns or alumni in recruitment campaigns.
- Think in terms of a strategic long term vision (e.g., three years) and target locations/areas to make an investment that will yield returns in the future.
- Consider targeting “second cities” as they can be more productive for recruitment compared to the demands of brand-conscious residents in capital cities.

REGIONAL EDUCATIONUSA EVENTS

Use the EducationUSA website to find country specific information about upcoming fairs, webinars, and other events and activities. Several EducationUSA Advising Centers are planning local events during the year.

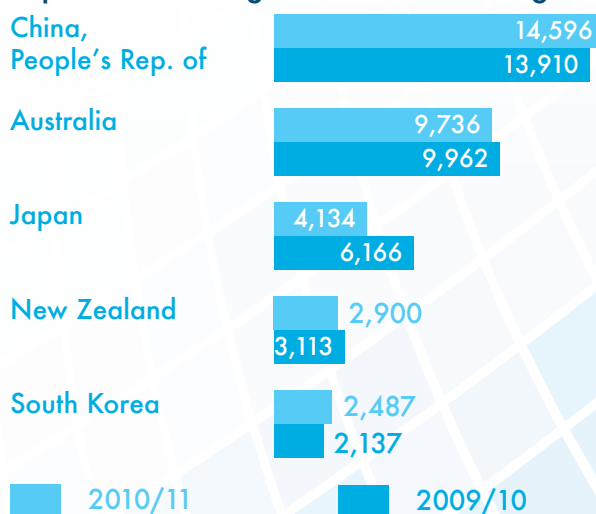
FAIRS AND CONFERENCES

In addition to the many, in-person student recruitment opportunities offered through EducationUSA fairs and conferences, representatives of U.S. institutions often also capitalize on these events to receive a country briefing from EducationUSA advisers, meet with U.S. embassy public affairs and consular staff (subject to scheduling availability), make a presentation at an EducationUSA Advising Center, or visit a local high school or college. Contact the EducationUSA staff organizing these events to explore options for maximizing the impact of your participation.

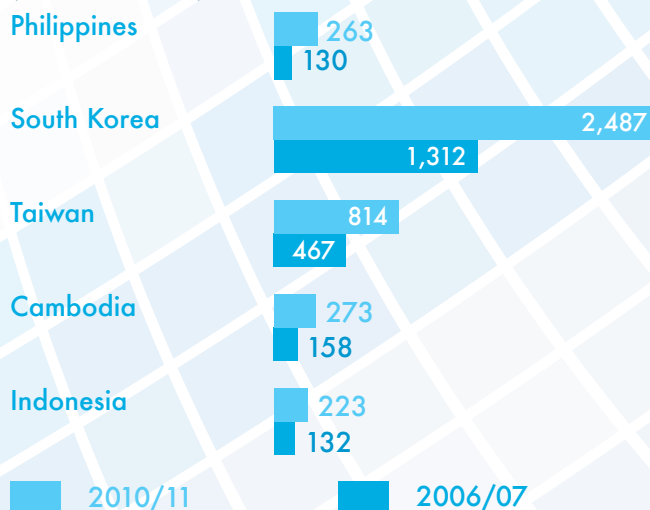
 **16.4%**

South Korea has one of the highest growth rates for receiving U.S. students

Top Five Receiving Countries in the Region



Five Countries (with over 100 students) with Highest Percentage Growth, U.S. Students (5-Year Trend)



Source: Institute of International Education, funded by a grant from the U.S. Department of State, Open Doors Report on International Educational Exchange, 2008-2012.

- **Korea:** EducationUSA Pavilion at the Asia-Pacific Association for International Education (APAIE). March 17-20, 2014, Seoul, Korea. EducationUSA hosts a U.S. pavilion at the annual APAIE conference to provide an opportunity to develop and foster partnerships between U.S. universities and institutions in the EAP region. Learn more at <http://ow.ly/kUBNW>.
- **Southeast Asia:** EducationUSA fair series, typically January - March. Details of the 2014 spring tour will be announced soon. For more information, visit <http://ow.ly/kUBSB>.
- **Japan:** EducationUSA Tour, fall 2013. This is a free recruitment tour across Japan.

CENTER EVENTS

Check with individual centers to find out about activities they have planned. Attract students from all of EAP by participating in EdUSA Connects info sessions. Contact a REAC in the region to coordinate.

BEST TIMES OF YEAR TO INTERACT WITH STUDENTS

As a general rule for EAP, January to May and August to November are the best times to engage with students. However, please check with the advising center to see whether there are exams or holidays before planning your visit. *Note: The Lunar New Year impacts most of the region and many businesses and schools are closed during this time.

U.S. STUDY ABROAD IN THE REGION

Southeast Asia: In comparison to the number of U.S. students studying outside of the United States a year ago, Southeast Asia saw an eight percent increase in the number of study abroad students. Seven countries hosted more than 100 students in 2010/11, and Thailand, Singapore, and Vietnam each hosted more than 700 students (Open Doors, 2012).

China: EducationUSA China partners with President Obama's 100,000 Strong Initiative, a national effort designed to dramatically increase the number and diversify the composition of U.S. students studying in China. This initiative seeks to prepare the next generation of American experts on China who will be charged with managing the growing political, economic, and cultural ties between the United States and China. The initiative also seeks to develop specific opportunities and funding sources for underrepresented students to study in China.





EUROPE AND EURASIA

Albania, Armenia, Austria, Azerbaijan, Belarus, Belgium, Bosnia and Herzegovina, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Georgia, Germany, Greece, Hungary, Iceland, Ireland, Italy, Kosovo, Latvia, Lithuania, Luxembourg, Macedonia (The Former Yugoslav Republic of), Malta, Moldova, Montenegro, Netherlands, Norway, Poland, Portugal, Romania, Russian Federation, Serbia, Slovak Republic, Slovenia, Spain, Sweden, Switzerland, Turkey, Ukraine, United Kingdom

**143 EducationUSA
Advising Centers
in the Region:**

29 Comprehensive
53 Standard
61 Reference

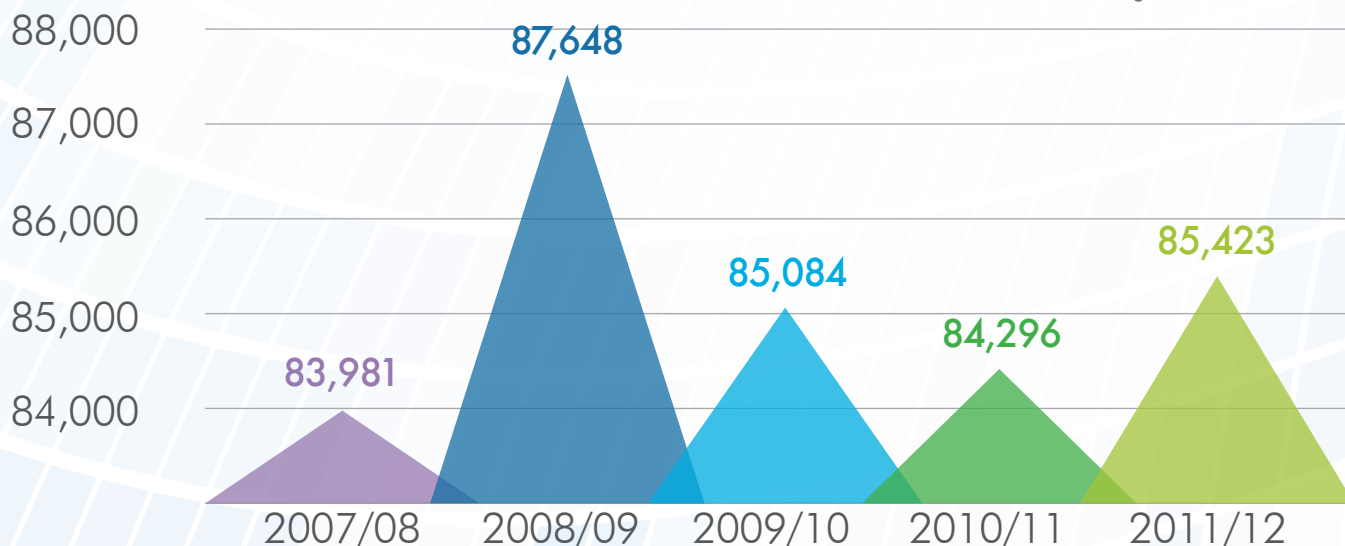
REGIONAL EDUCATIONUSA PROFILE

EducationUSA in Europe and Eurasia is a robust network of advising centers with highly qualified and skilled advisers who provide support not only to students who wish to study in the United States, but also to higher education institutions interested in recruiting and establishing linkages with European/Eurasian partners.

Opportunity Funds that support talented, economically disadvantaged undergraduate and graduate students with the upfront costs of applying to U.S. institutions are currently available through EducationUSA Advising Centers in Belarus, Russia, Turkey, and Ukraine to assist economically disadvantaged students of high academic excellence through EducationUSA Advising Centers. EducationUSA has conducted extensive outreach to broadcast these opportunities to both prospective undergraduate and graduate students.

Competitive college clubs and other cohort advising programs in Armenia, Azerbaijan, Cyprus, Georgia, Macedonia, Portugal, Russia, Ukraine and the United Kingdom offer intensive advising to prepare students for applying to undergraduate programs in the United States.

Student Mobility (5-Year Trend)



Source: Institute of International Education, funded by a grant from the U.S. Department of State, Open Doors Report on International Educational Exchange, 2008-2012.

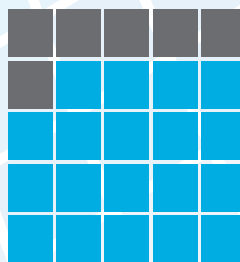


REGIONAL OVERVIEW

Europe and Eurasia is a strong, vibrant and dynamic region with institutions eager to link with U.S. partners, and offers high quality, diverse students, many of whom are able to afford the financial costs of study in the United States. This expansive region is second only to Asia in terms of student mobility to the United States. In order to support U.S. higher education institutions with their recruitment goals, over the past year EducationUSA Europe/Eurasia expanded virtual outreach, increased the number of reference centers, coordinated fair tours and engaged more U.S. study abroad students. Despite the economic crisis and ongoing attractive opportunities for European students to study within Europe, EducationUSA centers report exceptional interest in studying in the United States. Increasingly, U.S. institutions are recognizing three-year Bologna-compliant degrees, improving access and appeal for Europeans/Eurasians to pursue graduate studies in the United States.

RECENT TRENDS

- In Greece, recent economic uncertainty and the inability of the average Greek family to support their children's tertiary level studies, even at home, has forced some of the most talented young people to continue their undergraduate studies in the United States, mainly by seeking academic and athletic scholarships. The number of Greek students in the United States has picked up by five percent since 2010.
- The Nordic countries lead the trend of increased undergraduate study in the United States; Finland, Norway, and Sweden have the highest proportion of students at the undergraduate level. Government loans and grants for study abroad are a major factor.
- The United States faces ongoing competition from European institutions, particularly for students from central and eastern parts of the region. Access to Erasmus programs facilitates intra-European study for central European students, while Russian government funding attracts students from the former Soviet bloc. However, the desire to study abroad continues to grow, creating ripe opportunities for U.S. institutions. In order to maintain U.S. market share in these countries, EducationUSA strongly encourages U.S. colleges and universities to seek out these high quality students.
- About 75 percent of Europeans and Eurasians studying in the United States are pursuing a full undergraduate or graduate degree – more than 64,000 students (Open Doors, 2012). In addition, an increasing number of non-degree students are looking to the United States for practical training and internships.
- The ongoing economic crisis facing many European/Eurasian countries has not led to a decrease in mobility to the United States – in fact, student mobility has increased two percent in the past five years. Parents and students consider a U.S. education a valuable long-term investment, offering more security and better prospects for future employment.



↑ 75%

Europeans and Eurasians studying in the United States are pursuing a full undergraduate or graduate degree

COUNTRIES IN THE SPOTLIGHT

- **France:** France has seen a consistently upward trend in student mobility to the United States since 2007, with growth largely due to exchange and study abroad direct linkage programs. Many more French students are now interested in studying at community colleges – the relative low cost and integrated ESL programs are a big draw – and pursuing undergraduate programs in general. Top fields overall include law, engineering and business.
- **Germany:** Germany continues to be an attractive country for study. In 2012, 250,000 international students studied in Germany, with 38,300 completing their degrees there, signaling a rise of eight percent from the previous year (German Federal Statistical Office). Germany witnessed a 22 percent increase in U.S. study abroad students over the past five years, and is now the 7th most popular destination for U.S. students. Currently, the number of U.S. students in Germany roughly equals the number of German students studying in the United States.
- **Netherlands:** The Dutch EducationUSA/Fulbright center has seen increasing participation at outreach events in recent years, mirroring the 17 percent growth in Dutch student mobility to the United States over the past five years. Research by NUFFIC, the Dutch organization for international cooperation in higher education, indicates a rising popularity of ‘gap-year’, undergraduate, and non-degree study programs to the United States.
- **Romania:** Last year, a cohort of 27 academically talented Romanian students who worked closely with the EducationUSA Advising Center in Bucharest attracted \$1.2 million in scholarships, in addition to contributing \$210,000 of personal funds for their U.S. studies. This significant admissions success goes hand in hand with the special support services provided by EducationUSA Advising Centers to help students prepare for U.S. study.
- **Russia:** 4,805 Russian students enrolled in U.S. institutions of higher education during the 2011/12 academic year, up 4.3 percent from the previous year, and the first increase in three years (Open Doors, 2012). Considering that the population of 15-24 year olds in Russia has decreased 19 percent in the past five years, it is an extremely positive sign that the overall number of Russians studying in the United States has remained stable during that same period. Despite the declining youth population and increasing competition from other countries, the United States continues to be a preferred destination for Russian students – nearly 40 percent of TOEFL takers in Russia indicate the United States as their top choice for higher education.

Regional Student Totals by Top 5 Countries of Origin

Country Name	2011/2012	% Change from 2010/11
Turkey	11,973	-1.7%
Germany	9,347	-1.2%
United Kingdom	9,186	2.7%
France	8,232	1.7%
Spain	4,924	13.7%

Five Countries of Origin (with over 100 students) with Highest Percentage Growth, International Students (5-Year Trend)

Country Name	2007/08	2011/12	% Change
Kosovo	50	114	128.0%
Norway	1,264	2,016	59.5%
Azerbaijan	318	460	44.7%
Denmark	898	1,233	37.3%
Spain	3,660	4,924	34.5%

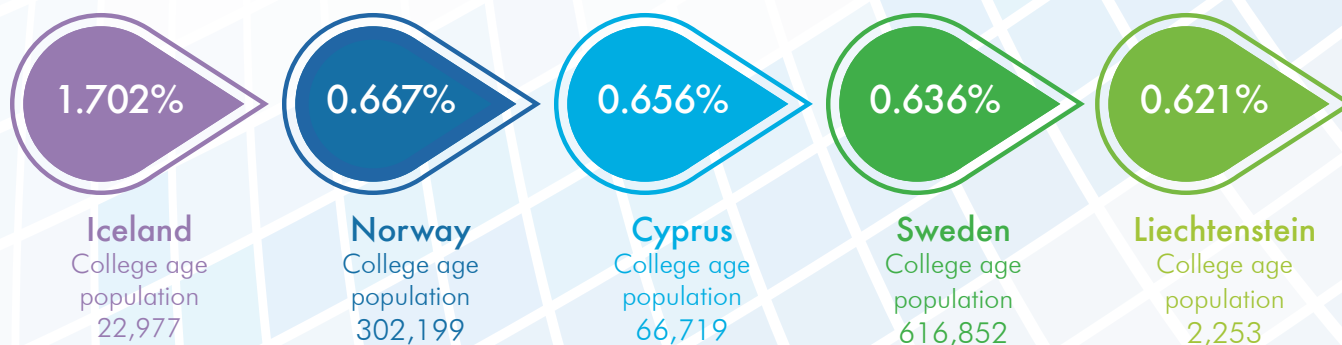
Source: Institute of International Education, funded by a grant from the U.S. Department of State, Open Doors Report on International Educational Exchange, 2008-2012.

128.0%

Kosovo has the largest percentage growth in the region over the last five years (with over 100 students)

- **United Kingdom:** Academic year 2012/13 saw a rise in tuition fees at most UK universities, driving significant interest in the United States by UK students. Over the past five years, there has been a nine percent rise in UK students heading to the United States (Open Doors, 2012). With SAT/ACT registrations up 30 percent in the past two years and 4,000 students at the USA College Day fair in London last autumn, it is clear that British students are looking to the United States as an education alternative.
- The main competitive destination for European students remains Europe itself. The EU's Erasmus program celebrated its 25th anniversary in 2012, with over three million participants over that time. It is to be expected that Asia will become a more popular destination for many European students in the near future, at the possible expense of the U.S. share on the global market.
- 2011/12 saw increased student mobility to the United States for the first time in several years for Armenia, Belarus, Moldova and Russia. The first generation to grow up in the independent countries of the former Soviet Union are ready and eager to experience the world in ways their parents and grandparents never could – and they increasingly view higher education in the United States as desirable and achievable.
- The oil-rich economies in Russia and Azerbaijan will continue to support strong markets for U.S. higher education institutions. Over 80 percent of EducationUSA Moscow's advisees studying in the United States are fee-paying students. The number of Azerbaijanis studying in the United States has increased 61 percent in the past five years. Students from both countries are particularly interested in engineering and business.
- Experts predict that universities in the United Kingdom will also increase tuition fees at the graduate level to make up for cuts in governmental funding, potentially driving the graduate student population to look for alternatives in the United States along with their undergraduate peers.
- The Dutch government plans to introduce a loan system to replace the current grant-in-aid system, starting in academic year 2014/15. Currently, Dutch students receive government grants to finance their studies. If the government's proposal becomes law, Dutch students will have to take out loans to fund their higher education.

Five Countries of Origin with Highest Per Capita College-Age Student Mobility to the United States



Sources: UNESCO Institute for Statistics, Education Table 2 "Demographic and economic data"; School age population-Tertiary: Total for 2010, 2011, and 2012, available at <http://ow.ly/lbygL>. This chart excludes countries that had no data available or were not reported by UNESCO. Student totals from Open Doors 2012.

Predictions are that fewer Dutch students will actually enroll at higher education institutions, and of those that do enroll, fewer will have the financial means to study abroad. However, Dutch students will be able to use these loans to study in the United States. In addition, the number of students interested in an internship or practical training in the United States is expected to increase.

FOREIGN GOVERNMENT AND PRIVATE FUNDING

- Governments in 18 European and Eurasian countries offer scholarship programs for their citizens to study abroad: Austria, Azerbaijan, Cyprus, Czech Republic, Estonia, France, Georgia, Macedonia, Netherlands, Norway, Romania, Russian Federation, Slovak Republic, Slovenia, Sweden, Switzerland, Turkey, and Ukraine.
 - In 2012/13, the government of Norway extended its grants and loans for study in the United States to more than \$40,000 annually, and for a full four years of U.S. undergraduate study, up from the previous three-year limit. Currently, about 10 percent of the 21,300 Norwegians studying abroad are in the United States. Over the past five years, Norway has shown a 60 percent increase in mobility to the U.S., and this strong trend is predicted to continue.
- More than 80 foundations provide scholarships for citizens of specific European and Eurasian countries to study abroad:
 - The Slovene Human Resources Development and Scholarship Fund supports numerous scholarship programs, about \$5 million for study abroad: Learn more at www.sklad-kadri.si.
 - The Open Society Foundation offers grants to students from select countries for study in various levels and fields at accredited universities in the United States and other countries. Learn more at <http://ow.ly/kUCMv>.
 - After a successful pilot year, the Sutton Trust, in partnership with the U.S.-UK Fulbright Commission, is expanding its United States program to support highly-talented low- and middle-income youngsters to apply for undergraduate study in the United States. The students, chosen from across the UK, are academically high achievers, primarily first-generation college goers, and sure to make a significant contribution to the campus community and its diversity. Learn more at <http://ow.ly/kUDkT>.
- For a complete list of European and Eurasian countries' government and private-funded scholarship programs, visit the REAC Europe portals on the EducationUSA website, at <http://ow.ly/kUDBm>.

VIRTUAL AND SOCIAL MEDIA USAGE

- The Belgian EducationUSA Advising Center had almost 250,000 views on its YouTube channel in 2012, double that of the previous year, and is the top YouTube channel in the entire global EducationUSA network. Overall, EducationUSA centers in Europe and Eurasia had 55 percent (369,351 of 666,041) of the total YouTube views in our global network.
- The Belarus EducationUSA Advising Center is second in Facebook members of all EducationUSA centers, worldwide. In addition, the Belarus YouTube channel is ranked ninth after its first year of existence. The secret to success is original content in Russian, which serves the Russian-speaking world.
- EducationUSA Facebook groups in Belarus, Azerbaijan, Georgia and Russia are among the top 10 EducationUSA Facebook groups globally.
- The EducationUSA adviser serving Belarus from an outpost in Vilnius, Lithuania, was a guest on the popular Belarusian TV program "Two vs. Two" (два на два), speaking about the value of international education. The program, hosted on the only independent television station operating inside Belarus, reached an estimated Belarusian audience of one million viewers.
- EducationUSA in the Russian Federation is reaching more prospective students with online initiatives, including: test prep webinars led by Virtual Student Foreign Service eInterns (<http://ow.ly/kUDKG>), competitive college clubs on Facebook, and virtual advising from coast to coast.
- EducationUSA Moscow launched a blog in December 2012 focused on issues related to education in the United States and Russia. The bilingual posts cover topics for Russians interested in pursuing higher education in the United States as well as for Americans interested in learning more about working with Russian students. Read the blog at <http://ow.ly/kUDUg>. This blog follows on the launch of the new EducationUSA Russia website (<http://ow.ly/kUDZd>), which provides accurate and comprehensive information and resources to the Russian-speaking population, as well as resources in English about Russia for U.S. admissions offices and study abroad students.

SUCCESSFUL RECRUITING STRATEGIES

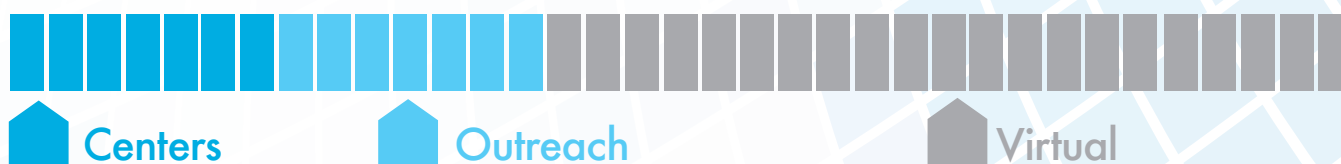
- Participate in EducationUSA college and university fairs to engage with students in countries where access is restricted.

- Look beyond the capital in Russia. Eager crowds awaited the U.S. delegation on the inaugural Siberia/Far East Tour to Novosibirsk and Vladivostok (2012). The tour was expanded in 2013 to include Yekaterinburg, hosting the first-ever U.S. higher education fair in the capital of the Ural region.
- Set to start in 2014, the European Commission's Erasmus for All Program will address student and professional training and mobility. Focus on expanding and promoting your institution's career development services for international students. Highlight the career options and international employment of graduates.
- Cultivate relationships with current international students and international alumni. Bring them with you to EducationUSA Fairs, or ask them to work your institution's table if you can't travel there yourself.
- Highlight the cost-saving dimensions of 2+2 articulation agreements with community colleges, especially in Eurasia.
- Leverage your scholarships—even partial ones. Helping to reduce the cost of attendance even a bit can sometimes make a big impact.
- Set up direct linkage and exchange agreements with European higher education institutions in order to increase your profile. Often an exchange program encourages students to return later on for a longer degree program.
- Understand the cultural and procedural differences of university admissions in Europe. The college application process can be less cumbersome in Europe than in the U.S. – sometimes it involves submitting just one exam result. Students, therefore, tend to leave their applications to the last minute. Prepare for last minute questions and rushed deadlines. You can help overcome this by clearly stating and deadlines and work with potential applicants to make sure they are on track in good time.
- Offer research or teaching assistantships as part of graduate programs.
- Provide parents, other family members, teachers, and other decision influencers with information in their native language.

REGIONAL EDUCATIONUSA EVENTS

Use the EducationUSA website to find country specific information about upcoming fairs, webinars, and other events and activities. Several EducationUSA Centers are planning local events throughout the year.

In calendar year 2012, EducationUSA in Europe and Eurasia made 978,434 contacts.



276,052 contacts made through advising centers		251,476 contacts made through outreach activities		450,906 contacts made through virtual platforms*	
Advising Center-based Contacts	274,663	Education Fairs	153,162	Social Media Platforms	448,690
U.S. Institution Representative Visits	1,389	American Corners / Centers	15,709	Webinars / DVCs	2,216
		Local Universities / Secondary Schools	45,026		
		Other Fairs / Conferences / Seminars	11,804		
		Host Government Events	558		
		Embassy / Consulate Events	3,102		
		Public Locations	2,488		
		Other Activities	19,627		

* Includes social network page likes, profile friends, or group members; video views; Skype contacts; blog and mini-blog followers; digital video conference participants; and EdUSA Connects webinar participants.

FAIRS AND CONFERENCES

In addition to the many in-person student recruitment opportunities offered through participation in EducationUSA fairs and conferences, representatives of U.S. institutions often also capitalize on these events to receive a country briefing from EducationUSA advisers, meet with U.S. embassy public affairs and consular staff (subject to scheduling availability), make a presentation at an EducationUSA Advising Center, or visit a local high school or college. Contact the EducationUSA staff organizing the event to explore options for maximizing the impact of your participation.

- **Turkey:** EducationUSA Pavilion at European Association for International Education (EAIE). Istanbul, Turkey September 2013. EducationUSA hosts a U.S. pavilion at the annual EAIE conference. Learn more at <http://ow.ly/kUECL> or <http://ow.ly/kUEuc>.
 - o More than 4,000 higher education professionals from 80 countries joined Europe's largest international education conference in Dublin, Ireland, in September 2012. Participants report that EducationUSA's Pavilion led to increases in visibility, student mobility and income for the 14 U.S. exhibitors. One senior representative reported, "The booth looked great
- very professional (and) created a good brand for the U.S." In terms of return on investment, a representative from the University of California, San Diego reported, "I estimate that the minimum gross annual dollar amount of new partnerships as a direct result of my attendance at EAIE, which for me must include the home base of the U.S. Pavilion, will be around \$100K, with the possibility of another \$50K from special contracts if they materialize."
- **Russia:** EducationUSA Russia Siberian Tour in Yekaterinburg, Novosibirsk and Vladivostok, March 9-17, 2013. <http://ow.ly/kUEIz>
- **Scandinavia:** College Day Scandinavia Tour in Stockholm, Malmö/Copenhagen, Oslo and Reykjavik, April 8-12, 2013. <http://ow.ly/kUEO9>
- **United Kingdom:** USA College Day London, England, September 27-28, 2013. <http://ow.ly/kUERf>
- **Belgium:** Brussels College Night, October 1, 2013. <http://ow.ly/kUEWJ>
- **The Netherlands:** EducationUSA / Fulbright Netherlands, Amsterdam, October 4, 2013. <http://ow.ly/kUF3t>
- **Greece:** 19th Annual U.S. University Education Fair in Athens, Greece, October 7, 2013. <http://ow.ly/kUF9h>



- **Cyprus:** EducationUSA / Fulbright Cyprus, Nicosia, October 8, 2013. <http://ow.ly/kUFcS>
- **Eurasia:** EducationUSA Fair Circuit (Russia, Azerbaijan, Georgia, Armenia, Ukraine), October 28-November 6, 2013 (TBC) <http://ow.ly/kUFko>

CENTER EVENTS

Check with individual centers to find out which activities they have planned. Some ongoing highlights include:

- **Alumni Fairs:** American ex-pats and host-country nationals who have studied in the United States represent their U.S. alma maters during these fun and exciting events. Students, parents, and teachers attend, with interests in all levels and programs of U.S. higher education opportunities. EducationUSA Advising Centers recruit alumni volunteers; U.S. institutions send brochures, view books, posters, DVDs, or other promotional material for alumni to distribute at the fair.
- **EdUSA Connects:** Representatives from U.S. institutions are invited to present on "hot admissions topics" to prospective students in target countries, providing a great service for international students, and free exposure for your institution.
- When in Brussels be sure to schedule an interview with EducationUSA at the U.S. Embassy's state-of-the-art video and radio studio, and add your video to the outstanding collection at <http://ow.ly/kUFtH>.

BEST TIMES OF YEAR TO INTERACT WITH STUDENTS

EducationUSA Advisers will work with you to make your visit a success. EducationUSA recommends visiting the region during the following months: September-November, March-May.

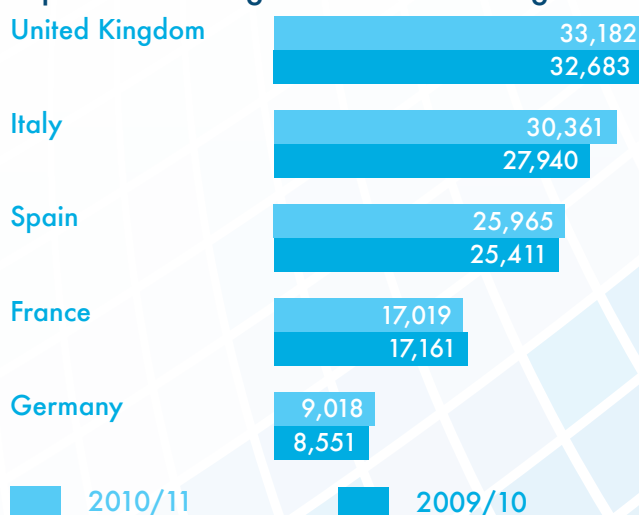
U.S. STUDY ABROAD IN THE REGION

Based on the Institute of International Education's Open Doors Report on International Educational Exchange, Europe continues to host almost 55 percent of all study abroad students enrolled in U.S. higher education. While the United Kingdom, Italy, Spain, and France continue to be top host destinations, there were notable increases in number of U.S. students studying in Germany, Denmark, and the Netherlands as well. Several countries are demonstrating noteworthy growth as non-traditional destinations, with increases in Bulgaria, Finland, Poland, Portugal, Romania and Turkey.

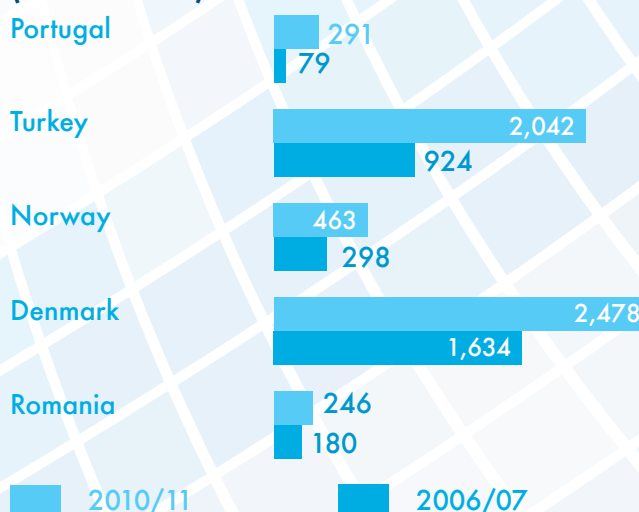
↑↑↑ 212%

Turkey has one of the highest growth rates for receiving U.S. students

Top Five Receiving Countries in the Region



Five Countries (with over 100 students) with Highest Percentage Growth, U.S. Students (5-Year Trend)



Source: Institute of International Education, funded by a grant from the U.S. Department of State, Open Doors Report on International Educational Exchange, 2008-2012.

MIDDLE EAST AND NORTH AFRICA

Algeria, Bahrain, Egypt, Iran, Iraq, Israel, Jordan, Kuwait, Lebanon, Libya, Morocco, Oman, Qatar, Saudi Arabia, Syria, Tunisia, United Arab Emirates, West Bank and Gaza, Yemen

24 EducationUSA Advising Centers in the Region:

19	Comprehensive
19	Standard
5	Reference

REGIONAL EDUCATIONUSA PROFILE

EducationUSA Advising Centers in the Middle East and North Africa (NEA) region are located in U.S. embassies and consulates, AMIDEAST offices, and Fulbright commissions. EducationUSA advising activities in Iran and Syria are conducted virtually from Washington, DC.

In the Middle East and North Africa, the Department of State's Near East (NEA) region, each advising center tailors its programs and activities to the local market. EducationUSA advisers continue to provide guidance to government scholarship offices in Iraq, Kuwait, Libya, Oman, Qatar, Saudi Arabia, and the United Arab Emirates. They also assist scholarship students in finding appropriate programs. In Kuwait, EducationUSA advisers conduct evening advising at the National Union for Kuwaiti Students to accommodate student schedules and have space for advising inside the Ministry of Higher Education.

EducationUSA advisers in Arab Spring countries (Egypt, Libya, and Tunisia) continue to see large numbers of interested students. In Tunisia, the Ministry of Higher Education (MOHE) is receptive to U.S. government programming efforts, including EducationUSA advising, and shows interest in strategic partnerships and collaboration with U.S. institutions of higher education. Libya's MOHE has announced 500 scholarships for graduate students; guidance is expected soon on implementation of the initiative. With funding from the Bureau of Educational and Cultural Affairs (ECA), 10 EducationUSA advising assistants have been trained and are working at Libyan university-based language centers to assist students in the U.S. admissions process.

In the region's six competitive college clubs (CCCs), advisers meet bi-monthly with top high school students to prepare them for study on U.S. campuses and to guide them through the college application process. Advisers work with students to find the best institutional fits for them—academically, socially, and financially. CCC activities include community service projects, book clubs, poetry recitals, spelling bees, speakers, test preparation, and information sessions on the application process. All clubs encourage student leadership initiatives. Almost 200 students from the NEA region have successfully completed the CCC program and are in the United States or heading there in fall 2013.

Opportunity Funds that support talented, economically disadvantaged undergraduate and graduate students with the upfront costs of applying to U.S. institutions are currently available through EducationUSA Advising Centers in Egypt, Lebanon, Tunisia, and Yemen.

College counselor groups in the region convene high-school counselors to promote best practices and cover topics such as student visas, writing school profiles, application timelines, and how to help students select the institutions that best meets their needs. The EducationUSA network provides members of college counselor groups with reference collections of college advising resources them to ensure that visiting U.S. admissions officers have productive trips and can interact with a broad range of students.



REGIONAL OVERVIEW

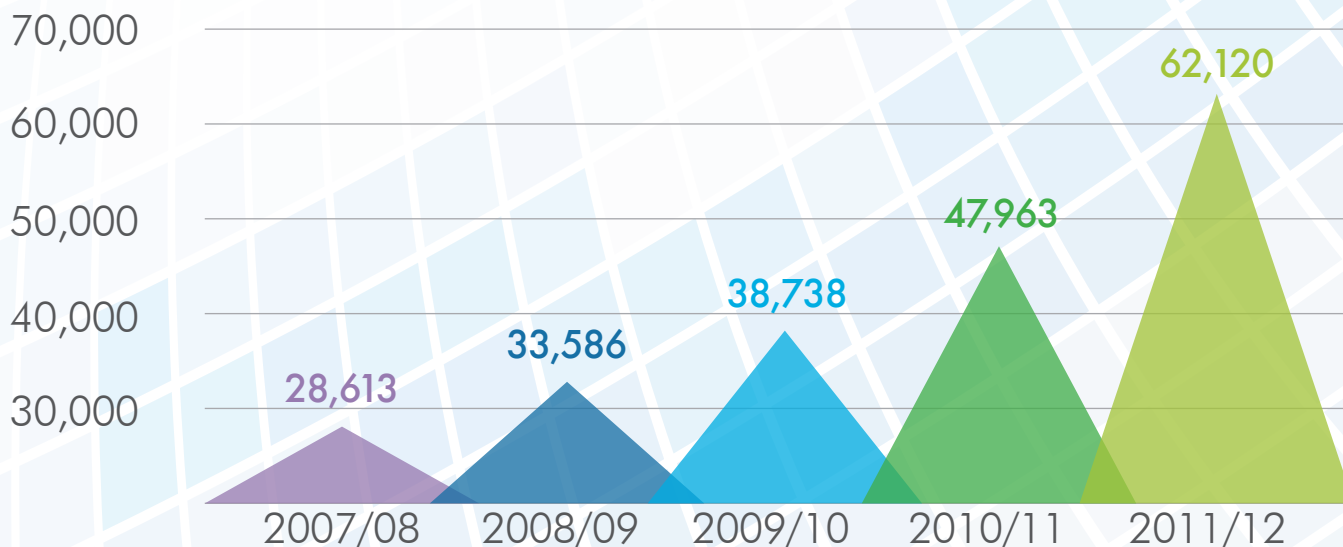
The Middle East and North Africa region extends from Morocco to Iran. Some governments in the region are increasingly focused on education as a factor in economic stabilization, and therefore are also focused on sponsoring educational opportunities abroad for their students.

Governments and international organizations in NEA have increased access to education and improved literacy. However, according to a 2011 report from the Population Reference Bureau, 20 percent of the region's population is between the ages of 15 and 24, and the demand for postsecondary education far exceeds the capacity of local universities. Additionally, the quality of the higher education systems leaves many without the skills to enter a competitive labor market. Countries such

as Saudi Arabia, Qatar, and the United Arab Emirates have responded by opening community colleges, U.S. branch campuses, and women's colleges. Other countries in the region have engaged both the U. S. government and U.S. colleges and universities about expanding local higher education capacity through institutional linkages. Saudi Arabia's new women's college, Princess Noura Bint Abdulrahman University, boasts a capacity for 60,000 students. It offers opportunities for women to study medicine, pharmacy, management, computer sciences, and various languages—subjects that women have difficulty studying in the gender-segregated public universities in Saudi Arabia. Universities in the Gulf are interested in hosting U.S. educated professors to develop the capacity of their own universities and express eagerness to engage with American faculty interested in collaborative research and teaching opportunities. While students in the

Student Mobility (5-Year Trend)

Source: Institute of International Education, funded by a grant from the U.S. Department of State, Open Doors Report on International Educational Exchange, 2008-2012.



region have greater access to universities at home, there is still strong interest in pursuing education in the United States, particularly at the graduate level. The United States remains the top higher education destination for students from this region, as reflected in the 33.2 percent increase in the number of Middle Eastern students and the 0.7 percent increase in North Africans students enrolled at U.S. colleges and universities in 2011/12 (Open Doors, 2012).

RECENT TRENDS

- Many countries in the region want their workforces to include professionals trained in the United States. Governments support this goal through scholarship programs, short term grants for faculty, and short term training programs for government officials and administrators.
- Students continue to study in destinations other than the United States for reasons such as Canada’s quick track to citizenship and the United Kingdom’s geographic proximity. Regional changes in governments and economies related to the Arab Spring have led many families to pursue opportunities in countries where the path to citizenship is clear.
- The Arab Spring uprisings illustrated the desire for change and reform among young people and these are now demanding improved access to higher education and employment. Financial uncertainty weighs heavily on students and families in these countries. EducationUSA advisers field frequent inquiries about financial aid for study in the United States.
- Many universities in the region want to develop linkages with U.S. institutions. The EducationUSA REAC and advisors continue to engage local institutions on how to identify appropriate U.S. partners and develop effective, reciprocal student and scholar exchange agreements.

COUNTRIES IN THE SPOTLIGHT

- **Libya:** The MOHE wants to send 10,000 students to study overseas. Most of these students will need English language training. Despite interruptions in funding in previous years, the MOHE scholarship program is a viable option for students interested in studying abroad. At the ministry, the Department of the External Mission is the key implementer of the government scholarship program.
- **Kuwait:** The government of Kuwait seeks to increase the number of undergraduate students studying in the United States and scholarships are due to be announced in July.

Regional Student Totals by Top 5 Countries of Origin

Country Name	2011/2012	% Change from 2010/11
Saudi Arabia	34,139	50.4%
Iran	6,982	24.1%
Kuwait	3,722	24.1%
Israel	2,490	-7.8%
Egypt	2,201	0.9%

Five Countries of Origin (with over 100 students) with Highest Percentage Growth, International Students (5-Year Trend)

Country Name	2007/08	2011/12	% Change
Libya	155	1,328	756.8%
Saudi Arabia	9,873	34,139	245.8%
Qatar	345	979	183.8%
Iraq	307	809	163.5%
Iran	3,060	6,982	128.2%

Source: Institute of International Education, funded by a grant from the U.S. Department of State, Open Doors Report on International Educational Exchange, 2008-2012.

756.8%

Libya has the largest percentage growth in the region over the last five years (with over 100 students)

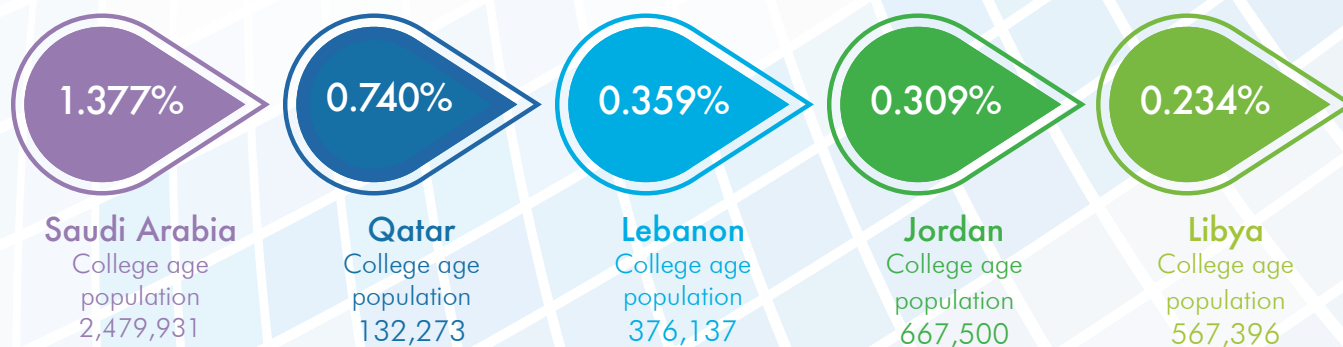
WHAT TO EXPECT IN THE NEXT THREE TO FIVE YEARS

- Overall, American institutions of higher education can expect to see sustained interest from countries offering government scholarships, with an emphasis on graduate education and professional master's programs.
- Issues of economic and social integration continue to plague North African countries and while interest in studying in the United States is strong, stable household incomes are few. While post-revolution political instability in some countries has inhibited the establishment of institutional linkages, the U.S. government continues to play a role in youth development and education.
- Governments look to the United States for educational expertise and are eager to send students abroad to gain the knowledge and skills they will need to contribute to higher education reform at home. American institutions should expect more calls for partnerships, linkages and U.S. faculty visits to the region. Many universities in the region have funding to send faculty to the United States for training in teaching methods, advanced research and administration.
- Despite a reluctance to allow young women to leave home for study in the United States, EducationUSA advisers continue to highlight America's 52 women's colleges as excellent options for young women. Similarly, EducationUSA advisers promote summer school and high school opportunities to encourage and ease the transition to a U.S. higher education campus.

FOREIGN GOVERNMENT AND PRIVATE FUNDING

- **Bahrain, Egypt, Iraq, Kuwait, Libya, Oman, Qatar, Saudi Arabia, and the United Arab Emirates** currently have government scholarship programs. Algeria is expected to fund a small cohort of doctoral candidates in computer science, English, pharmaceutical engineering and management in the near future. Among the chief barriers to recruiting funded students is that many governments maintain exclusive lists of approved U.S. institutions and will only support study at vetted colleges and universities. A visit to the cultural missions of these countries in Washington, DC is an effective strategy to raise awareness about your institution, express interest in hosting students from the region, and increase the chances of inclusion on these lists.
- Many governments sponsor their own college and university fairs and appreciate the attendance of U.S. institutions. EducationUSA advisers can provide guidance on participating in these events and facilitate communications with ministries of higher education. Consider sending faculty members to EducationUSA-sponsored events where staff can arrange faculty-to-faculty dialogues and provide U.S. higher education representatives with a focused approach toward collaborative research projects.
- Many oil companies in the region and other private firms offer scholarships to their employees. These funds are available for current and future employees working in the science, technology, mathematics, and engineering (STEM) fields. SABIC and Saudi Aramco have programs for high school students who are on track to become employees at these companies following university training in the United States.

Five Countries of Origin with Highest Per Capita College-Age Student Mobility to the United States

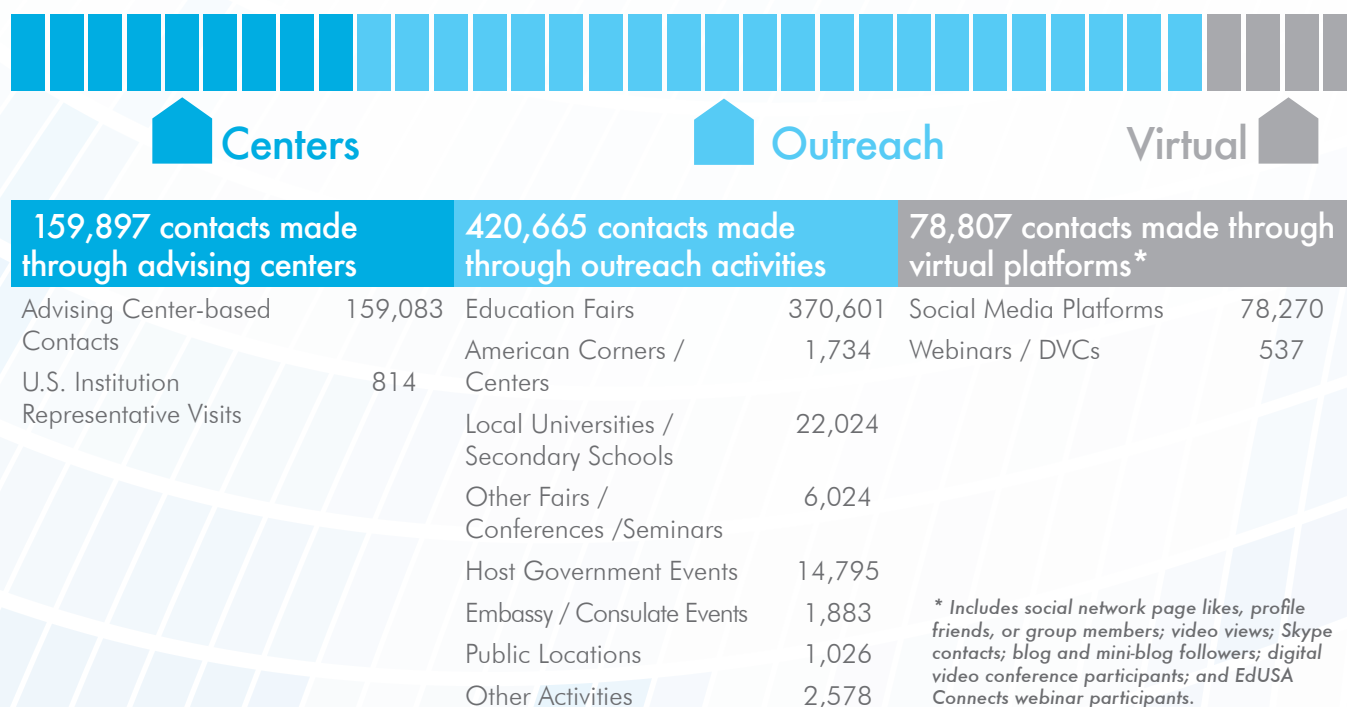


Sources: UNESCO Institute for Statistics, Education Table 2 "Demographic and economic data"; School age population-Tertiary: Total for 2010, 2011, and 2012, available at <http://ow.ly/lbygL>. This chart excludes countries that had no data available or were not reported by UNESCO. Student totals from Open Doors 2012.

VIRTUAL AND SOCIAL MEDIA USAGE

- According to Internet World Statistics (<http://ow.ly/kUG2A>), there are 155 million internet users in the NEA region. Internet connectivity is generally sufficient both in homes and cyber cafes in large cities (with the exception of Algeria and Yemen).
- The EducationUSA adviser for Iranian students is based at the Institute of International Education in Washington, DC and provides guidance to students virtually. The EducationUSA Iran website received nearly 200,000 visits in 2012, and over 8,500 individuals subscribe to its e-newsletters.
- The virtual adviser for Syrian students currently is based at the Department of State in Washington, DC. The EducationUSA network continues to assist Syrian students through Skype, email, and a blog designed to highlight Syrian students in the United States.
- Facebook is the most visited website in most of the region, and now includes more than 40 million users. Egypt, Israel and Saudi Arabia are the top three Facebook-using countries regionally with users posting in both English and Arabic or Hebrew.
- YouTube is widely used by students to view university videos. Even in countries where the site is banned, students access it by using a proxy.
- Twitter's popularity continues to increase, most likely because Arab audiences generally prefer to gather information through dialogue and Twitter's conversational nature is appealing.
- Since the cultures in the region value face-to-face and verbal interaction, platforms such as EdUSA Connects interactive webinars provide promising opportunities to engage youth while also informing them about educational opportunities in the United States.
- North African countries and Yemen have significant youth populations and large unemployment issues, which correlates to an increased number of hours that users spend on the internet.
- The use of mobile apps among students in the region is increasing. Interactive & Social Media News in the Middle East (<http://ow.ly/kUGbM>) reported that in a random sample of 3,000 respondents, 95 percent of smartphone users have installed apps, smartphone users have purchased an average of 29 apps, and 51 percent of smartphone users access their apps throughout the day.
- Challenges to virtual and social media usage include power outages, which are common in Gaza, Iraq, Libya, Syria, and Yemen, as well as connectivity issues, and Internet restrictions. Some large files can be difficult for students to open. Consider sending promotional videos and other large electronic files directly to EducationUSA Advising Centers where students can open and view them more easily.

In calendar year 2012, EducationUSA in Middle East and North Africa made 659,369 contacts.



SUCCESSFUL RECRUITING STRATEGIES

- Translate your website into Arabic, Persian, or Kurdish and record videos of your students from the Middle East and North Africa as a means to engage parents and students with limited English language skills. Particularly at the undergraduate level, students want to see what living arrangements are like. In the interest of providing an interactive and positive experience, more visual information about living on campus would be useful.
- Highlight institutional support and student services for those students who bring families and chaperones as well as those who travel alone. Conduct focus groups with new students to ask them about how to simplify the application and settling-in process.
- Keep family members in mind; parents and children in the region play an important role in the decision-making process. Many graduate students will bring their families with them to the United States and prefer institutions that provide support for households.
- Leverage word of mouth, particularly important in the region. Cultivate relationships with current international students and international alumni and visit with alumni when recruiting abroad. Alumni, many of whom are in high ranking positions in the public and private sectors, appreciate the opportunity to engage with admission officers from their alma maters.

REGIONAL EDUCATIONUSA EVENTS

Use the EducationUSA website to find country-specific information about upcoming fairs, webinars, and other events and activities. Several EducationUSA Advising Centers are planning local events during the year.

FAIRS AND CONFERENCES

In addition to the many in-person student recruitment opportunities offered through participation in EducationUSA fairs and conferences, representatives of U.S. institutions often also capitalize on these events to receive a country briefing from EducationUSA advisers, meet with U.S. embassy public affairs and consular staff (subject to scheduling availability), make a presentation at an EducationUSA Advising Center, or visit a local high school or college. Contact the EducationUSA staff organizing the event to explore options for maximizing the impact of your participation.

- **Israel:** EducationUSA Undergraduate Fair, Tel Aviv, Israel; September 2013. MBA Fair (TBD)
- **Iraq:** EducationUSA Fair, Erbil and Baghdad, Iraq; October 2013. EducationUSA advisers seek to provide the opportunity for students from Iraq to meet directly with U.S. university admissions representatives.



- **United Arab Emirates:** EducationUSA Pavilion at NAJAH, Abu Dhabi, UAE; October 29-31, 2013. Participate in the EducationUSA Pavilion at NAJAH, the official government-sponsored educational expo.
- **Saudi Arabia:** International Exhibition and Conference on Higher Education, Riyadh, Saudi Arabia; April 2014.

CENTER EVENTS

- EducationUSA hosts monthly webchats and video conferences for students and advisers. Advisers would like to hold short, online discussions on different programs of study and undergraduate and graduate admissions issues faced by NEA students
- All centers conduct pre-departure orientations in June or July and some Gulf countries in January. Please make sure your accepted students check www.educationusa.info for dates.

BEST TIMES OF YEAR TO INTERACT WITH STUDENTS

- Best times: October–December, February, April–May
- Worst times: June–October (summer, Ramadan/Eid breaks)

Check with the advising center to find out about dates of exams or religious holidays before planning your visit. These times can vary as not all countries (and school systems within countries) are on the same academic timetable. Advisers will work with you to accommodate your needs and plans throughout the year.

U.S. STUDY ABROAD IN THE REGION

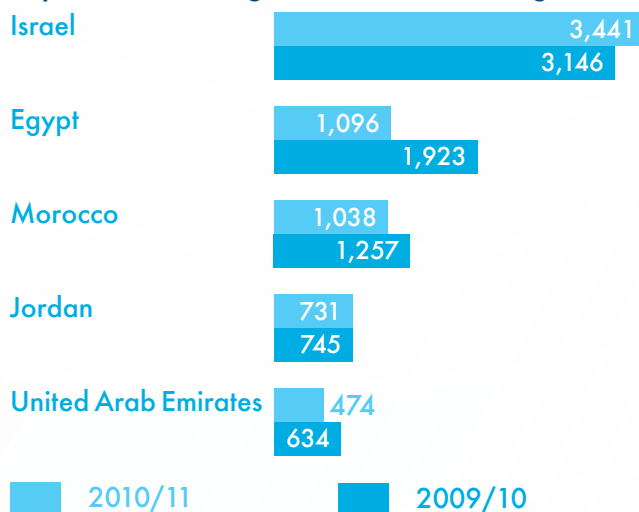
Study abroad has still not completely recovered from the events of the Arab Spring, but U.S. students continue to consider Morocco, Jordan and Israel as viable destinations. Previously, Israel has been the leading destination for study abroad, followed by programs in Egypt, Morocco, Jordan, and the United Arab Emirates, which continue to expand and attract students. While EducationUSA Advising Centers in the region do not host study abroad programs, they do offer internship programs and are eager to work with U.S. student volunteers. Encourage your study abroad office to inform students about connecting with EducationUSA. Offices that have internship opportunities include: Alexandria, Amman, Beirut, Cairo, Rabat, Tel Aviv, and the West Bank.



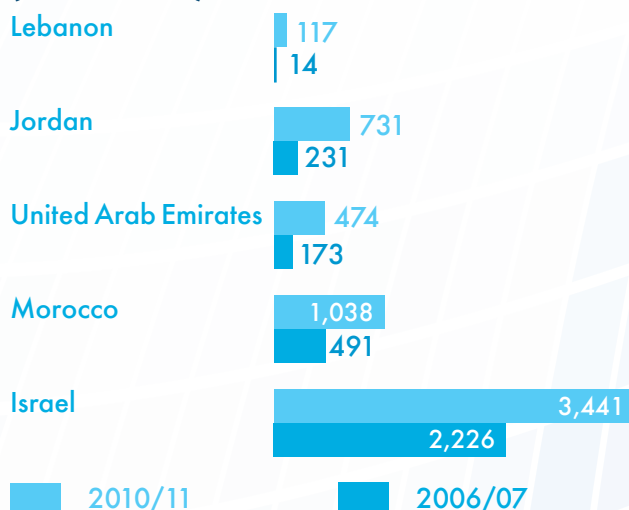
9.4%

Israel has one of the highest growth rates for receiving U.S. students

Top Five Receiving Countries in the Region



Five Countries (with over 100 students) with Highest Percentage Growth, U.S. Students (5-Year Trend)



Source: Institute of International Education, funded by a grant from the U.S. Department of State, Open Doors Report on International Educational Exchange, 2008-2012.

SOUTH AND CENTRAL ASIA

Afghanistan, Bangladesh, Bhutan, India, Kazakhstan, Kyrgyzstan, Maldives, Nepal, Pakistan, Sri Lanka, Tajikistan, Turkmenistan, Uzbekistan

30 EducationUSA Advising Centers in the Region:

16	Comprehensive
13	Standard
1	Reference

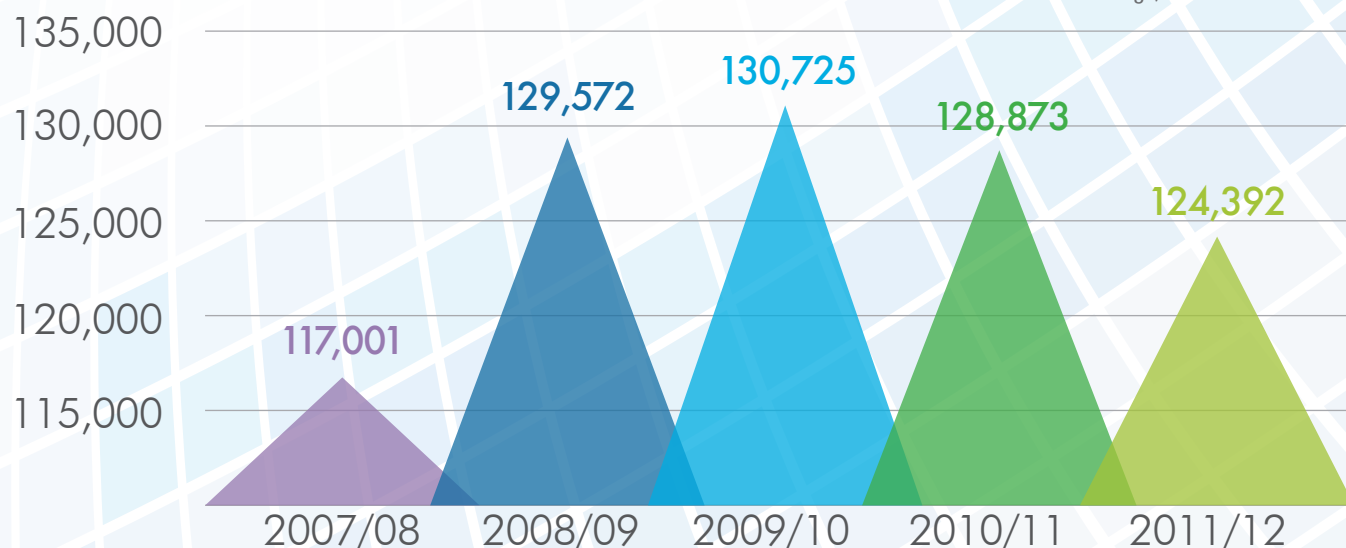
REGIONAL EDUCATIONUSA PROFILE

Advising centers in South and Central Asia (SCA) are located in U.S. embassies or consulates, Fulbright Commissions, American Councils/ACCELS offices and non-profit organizations. EducationUSA's credibility in South Asia is closely linked to the U.S. mission and host institutions. Centers in Naryn (Kyrgyzstan) and Hyderabad (India) closed in 2012, but local staff anticipates that a new center will be established in Hyderabad within the next year.

Opportunity Funds that support talented, economically disadvantaged undergraduate and graduate students with the upfront costs of applying to U.S. institutions are currently available through EducationUSA Advising Centers in Afghanistan, Bangladesh, Kazakhstan, Nepal, Pakistan, Sri Lanka, Tajikistan, Turkmenistan, and Uzbekistan.

Students are collecting and sharing an increasing amount of information online, notably in Central Asia. EducationUSA Advising Centers in the SCA region are prioritizing outreach as well as traditional and social media engagement. Centers also offer specialized cohort advising (virtual and in-person) to address specific aspects of admissions and often enlist the assistance of representatives from the U.S. higher education community.

Student Mobility (5-Year Trend)





REGIONAL OVERVIEW

South and Central Asia has one of the largest youth populations of the world, and is a showcase of cultural and geographical diversity. Because the South and Central Asia region is a priority region for the Department of State, building people-to-people ties and international exchange in the region is important to public diplomacy efforts.

India and Nepal rank among the top 25 countries of origin of international students pursuing undergraduate studies in the United States. For graduate education in the U.S., India, Nepal, Bangladesh and Pakistan are among the top 25 Countries of origin.

As cities grow in the region, people are leaving villages to live in “mega cities.” This is especially true in India, Pakistan, and Bangladesh, where this urban migration is putting great stress on infrastructures. Many countries in the region continue to have shortages in electricity, fuel and water. To meet these challenges, trained specialists in fields of urban development, sustainability, water management, law, engineering and other such social service fields are in demand.

RECENT TRENDS

- South and Central Asia remains a top recruiting region for U.S. institutions and the United States continues to garner high interest as a top study destination. However, in 2011/12, slightly fewer students from the region were studying the United States than the previous year (Open Doors, 2012). Overall, in-bound student numbers from Afghanistan, India, Nepal and Pakistan dropped,
- while the numbers of students coming to the United States from Bangladesh grew 15 percent, Kazakhstan increased 2.5% and Tajikistan by 19.7%.
- Bangladesh, Pakistan, Sri Lanka, and India continue to have a steady economic growth leading to growing numbers of middle class families with the financial capability to consider education abroad.
- People seek educational opportunities outside Nepal to relieve the uncertainty fueled by unstable political situations and the ensuing disturbance caused to academic programs in home countries. Secondary education has become more accessible in Nepal, resulting in increased numbers of students graduating from high school every year. Although the number of colleges providing undergraduate degrees has increased, there are few competitive colleges. This, coupled with the disruption of political unrest, has resulted in an increase in the enrollment of Nepali students—particularly at the undergraduate level—in various foreign destinations, including the United States.
- Particularly in Central Asia, interest in U.S. two-year institutions is growing due to lower cost, transfer opportunities, flexible English proficiency requirements, and small classes, as well as the fact that some community colleges do not require admission tests.
- In 2012, Kazakhstani universities launched the Academic Mobility program, which is similar to a semester abroad program but often shorter than a semester. Students’ home universities often partially fund the program, but students are responsible for finding a host institution on their own.

COUNTRIES IN THE SPOTLIGHT

India

- The U.S. dominates the foreign education market in India. Indians firmly believe that the United States has the highest quality higher education with the widest range of programs and the best research options. In India, it is not a question of, “Why study in the United States?” but, “How to study in the United States?” Among the major challenges faced by Indian students is the spiraling cost of higher education in the United States, which is further compounded by the depreciation of the Indian rupee. Additionally, concerns over safety on U.S. campuses have increased since recent school shootings, all of which have been covered widely in the Indian media.
- Although India is still a graduate market, interest in U.S. undergraduate education is rising. This trend is fueled by intense competition for limited seats at high-quality institutions in India. A number of international schools offering the International Baccalaureate curriculum have opened across India. Prep schools that traditionally focused on preparing high school students for the entrance exams to the Indian Institutes of Technology and other prestigious colleges in India have begun to offer a parallel track – preparing students for study at foreign institutions, primarily American institutions.
- Though undergraduate and graduate numbers are down from India, Optional Practical Training (OPT) continues to attract an increasing number of Indian graduate students, and Indian students in OPT led the region-wide increase in OPT numbers in 2012 (Open Doors). Engineering, business and computer science (and other STEM fields) continue to be top choices for Indian students.
- The Indian movie industry has played a part in promoting the United States as a destination for tourism and education. Several Indian movies feature “America-returned” heroes. The large number of IT workers from India who come back with tales of the magnificent higher education system in the United States also plant aspirations in the minds of their families and friends.
- Twinning programs and transfer options are of great interest to Indian students, given the attractive possibility of lowering the overall cost. Community colleges are similarly attractive destinations for the same reason.
- India’s Ministry of Human Resource Development (MHRD), which oversees Indian higher education, is increasingly looking toward the U.S. community college model as a means to educate and train youth in line with workforce needs.

Regional Student Totals by Top 5 Countries of Origin

Country Name	2011/2012	% Change from 2010/11
India	100,270	-3.5%
Nepal	9,621	-6.6%
Pakistan	4,600	-8.8%
Bangladesh	3,314	15.3%
Sri Lanka	2,902	-2.1%

Five Countries of Origin (with over 100 students) with Highest Percentage Growth, International Students (5-Year Trend)

Country Name	2007/08	2011/12	% Change
Bangladesh	2,305	3,314	43.8%
Kazakhstan	1,456	1,938	33.1%
Turkmenistan	166	209	25.9%
Sri Lanka	2,591	2,902	12.0%
Afghanistan	338	371	9.8%

Source: Institute of International Education, funded by a grant from the U.S. Department of State, Open Doors Report on International Educational Exchange, 2008-2012.

43.8%

Bangladesh has the largest percentage growth in the region over the last five years (with over 100 students)

Turkmenistan

- Students in Turkmenistan seek opportunities to study abroad because the estimated number of high school graduates each year exceeds the capacity of local higher education institutions. After reviewing international best practices, Turkmen authorities are exploring the possibility of extending education in secondary schools from 10 years to 11 or 12 years. During 2012, Turkmenistan's president held meetings with foreign officials to discuss prospects for international cooperation in the field of education, and he signed decrees to improve the educational system, especially in the area of science instruction.
- "Prep for Success" is a U.S. Embassy Ashgabat-funded initiative, administered by American Councils, to improve local capacity to administer the SAT and TOEFL exams, and better prepare students to pass these tests. Cohort advising takes place in conjunction with the EducationUSA Advising Center in Ashgabat. Students who complete the program and are admitted to a U.S. school are eligible for \$15,000 top-up scholarships to support their first year of study.
- The Head of the Ministry of Education's International Relations Department told local American Councils staff that roughly 200,000 high school students graduate each year, and there are only 5,500 university spots (not including Litsay which is roughly the Turkmen equivalent to a community college). He further estimated that 45,000 Turkmen students study abroad each year at foreign universities.

Bangladesh

- The 88 universities in Bangladesh serve a population of approximately 160 million, i.e., one university serves 1.8 million people. Local educational capacity is not sufficient to meet the increased demands for quality education that results from this country's

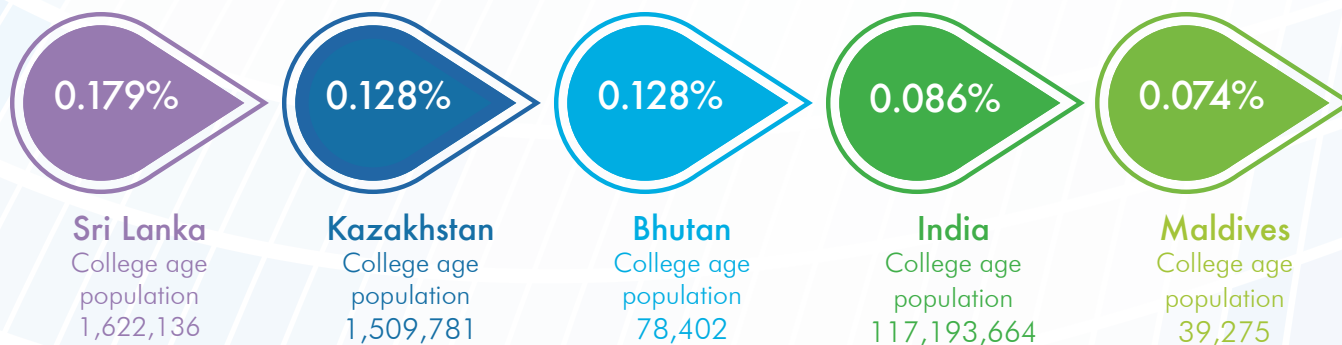
strong economic growth, a growth which has provided more people with the financial capability to consider education abroad.

- In 2012, Bangladesh's student population in U.S. degree programs grew 15.3 percent. This is the greatest increase in the region, and it is predicted there will be even faster growth in 2013/14.
- There are limited opportunities for research in local institutions, so students increasingly seek degree programs outside Bangladesh, with the United States being the country of first choice. At the undergraduate level, a growing middle class is increasingly willing to finance study toward a bachelor's degree as well.
- A growing number of Bangladeshi universities are eager to form partnerships and 2+2 programs, especially research institutes like Bangladesh University of Engineering and Technology and Dhaka University.

WHAT TO EXPECT IN THE NEXT THREE TO FIVE YEARS

- An analysis of F-1 visa issuance in India signals that the total number of Indian students in the United States will continue to decline in the next two to three years. The lower number of student visas issued to Indians from 2009 to 2012 will be reflected in the 2013 Open Doors report and continue into the future. The realistic estimate of Indian students in the United States from 2013-2014 is predicted to be approximately 80-90,000. EducationUSA India advisers note a direct correlation between the health of the U.S. economy and in-bound student mobility numbers.
- Competition for the limited number of seats at quality undergraduate institutions – particularly for engineering – may result in an increase in undergraduate applicants

Five Countries of Origin with Highest Per Capita College-Age Student Mobility to the United States



Sources: UNESCO Institute for Statistics, Education Table 2 "Demographic and economic data"; School age population-Tertiary: Total for 2010, 2011, and 2012, available at <http://ow.ly/lbygl>. This chart excludes countries that had no data available or were not reported by UNESCO. Student totals from Open Doors 2012.

to the United States. Targeted recruitment efforts will yield measurable results.

- There is tremendous potential for transfer applicants and twinning programs in India.
- Uzbekistan's president signed a resolution in December 2012 to increase foreign-language study in the country. According to the resolution, foreign languages—predominantly English—will be incorporated through games in all schools from early grades. Beginning in the 2013/2014 academic year, special topics, especially technical and international specialties, at higher educational establishments will be conducted in foreign languages. A proposal to the Cabinet of Ministers on the introduction of foreign language to university entrance exams for the 2015/2016 academic year is expected. If these reforms are implemented, they should lead to more interest in studying abroad.
- In India and Pakistan, a growing interest in short-term courses may boost careers of mid-career executives and others seeking to enhance their resumes. As a result, online programs that offer flexibility and award a valid degree will be in high demand. Across the region, EducationUSA centers are bringing awareness of MOOCs and OER to local students. As result, expect some increase in interest in these platforms.
- The U.S. Educational Foundation Pakistan (the Fulbright commission) is engaging with Community Colleges for International Development (CCID), therefore, we expect a rise of students enrolling in two-year programs. Interest

in other low-cost and short-term certifications will also be on the rise as students continue to try and find affordable ways to add the value of a U.S. qualification to their resumes.

- Urbanization in South Asia has led to increased aspirations for social mobility despite barriers low levels of proficiency in English. The need for unbiased, authentic information in cities not usually visited by U.S. college and university representatives will continue to intensify.

FOREIGN GOVERNMENT AND PRIVATE FUNDING

- **Kazakhstan:** The Ministry of National Education Scholarships provides full funding for study in the United States, including a monthly stipend for living expenses, a return plane ticket, and health insurance. The scholarships can be used for general English studies, master's, and Ph.D. programs, as well as short-term scientific training opportunities. <http://ow.ly/kUGEs>.
- **Tajikistan:** There is no government funding of study in the United States. Some private funding is administered by the Aga Khan Foundation. Since 1998 they have offered scholarships for both undergraduate and postgraduate studies in Tajikistan and abroad.

In calendar year 2012, EducationUSA in South and Central Asia made 1,059,193 contacts.



312,813 contacts made through advising centers

Advising Center-based Contacts	312,275
U.S. Institution Representative Visits	538

282,281 contacts made through outreach activities

Education Fairs	65,080
American Corners / Centers	4,765
Local Universities / Secondary Schools	70,184
Other Fairs / Conferences / Seminars	5,707
Host Government Events	545
Embassy / Consulate Events	3,740
Public Locations	510
Other Activities	142,253

453,596 contacts made through virtual platforms*

Social Media Platforms	453,364
Webinars / DVCs	232

* Includes social network page likes, profile friends, or group members; video views; Skype contacts; blog and mini-blog followers; digital video conference participants; and EdUSA Connects webinar participants.

VIRTUAL AND SOCIAL MEDIA USAGE

Across the region, most students do not have high-speed internet connections, making it difficult to download large files.

Afghanistan: Despite limited access to the internet in many provinces, students are increasingly using Facebook as a means of learning about educational opportunities. However, SMS is the predominant way of transferring information to students in Afghanistan, and programs have been developed to use cell phones in the recruitment process. Downloads of large files are difficult due to limited high-speed internet. Students most frequently share information using mobile telephone SMS. If you would like to send information about your institution or programs via SMS, contact EducationUSA in Kabul for assistance or advice.

India: A recent (2012) Google report found that, as a nation, India is the second largest user of Google to collect information on education worldwide. India is the second largest user of LinkedIn, and three percent of Twitter global users are Indian, despite the fact that India's internet penetration is only around 11 percent and social media penetration is just five percent. One-and-a-half million people begin internet usage every month, there are over 900 million mobile users which makes India's Telecom sector the second largest in the world. Around 57 percent of Indian youth in large cities access internet via mobile devices and YouTube was able to reach almost 41 percent of Indian internet users. These figures indicate that student population of 18-30 year-olds will depend on the internet to explore educational options. Mobile phones will become the key devices for the online consumption in India, and will continue to increase drastically. Inexpensive smartphones with low-priced data-plans and other inexpensive mobile devices like tablets will further increase online information consumption. Videos posted on websites like YouTube have become an integral part of the online ecosystem driving information across digital devices.

Nepal: The use of internet and social media is impeded by electricity shortages. Regardless, the EducationUSA Facebook page maintained by the U.S. Educational Foundation Nepal (Fulbright commission) received 5,000 fans in only one year. The three most popular websites among those who do use internet in Nepal are Facebook, Google, and YouTube.

Sri Lanka, Bangladesh, and Pakistan: Internet service is relatively fast and easily accessed. Students use Facebook and Skype widely, but YouTube is banned in Bangladesh and Pakistan at this time.

Kazakhstan: Social media pages are becoming

one of the strongest components for promoting study programs, scholarships and EducationUSA center events. Kazakhstani advisers extensively use Facebook and V Kontakte. Daily updates and bright pictures with useful information help to increase the number of followers every day. Also, social media pages are great tools to connect with local universities, schools and libraries, as well as to communicate with students from all parts of the country.

Kyrgyzstan: Virtual and social networking have become an essential communication tools not only between individuals, but also in marketing, advertising, trade, and public administration. According to a research study completed by SIAR (research and consulting center in Kyrgyzstan), 12.6 percent of Kyrgyzstanis are internet users, and most are young people aged 18 to 35.

Turkmenistan: Computer and internet literacy is gradually improving in Turkmenistan, and this development is opening new opportunities for EducationUSA Advising Centers to reach out to potential students to U.S. universities.

Uzbekistan: The center is increasing its presence in social media by posting weekly "study tips" on the U.S. Embassy Tashkent's Facebook page. These tips, the first of which was released during International Education Week 2012, have attracted attention and sparked lively, online discussions.

SUCCESSFUL RECRUITING STRATEGIES

- Connect to student audiences at EducationUSA college and university fairs. Parents appreciate the opportunity to meet university representatives, discuss available options, and have their questions answered so they then can feel well-informed when making decisions about where to apply.
- Provide informational seminars in advising centers when visiting the region. Such sessions, which showcase the breadth of U.S. higher education, also highlight the strengths of educational institutions about which the public may not be familiar. This subtle promotion of institutions or programs can significantly enhance recruitment efforts.
- Combine multiple partial financial aid awards into a single larger award to attract more students from South and Central Asia. Using aid in this way serves as a magnet to attract good students, and other students will in turn apply when they realize their peers are having positive experiences at an institution previously not widely recognized.
- Invite alumni of your institution to represent your college or university at EducationUSA fairs.

- Encourage currently enrolled international students to contact the EducationUSA center when they are visiting their home countries. EducationUSA staff can arrange peer mentoring sessions, though which current students are able to provide information to prospective applicants.
- Enlist the parents of currently enrolled students to meet parents of prospective students. They can provide a sense of security to families anxious about sending their children abroad.
- Highlight Optional Practical Training (OPT) options and internship platforms that will peak the interest of applicants who seek to weigh the cost of a U.S. education against career prospects.
- Use Skype for interviews. Applicants and their parents will be more relaxed talking to you in their home environment, and will appreciate the opportunity to represent themselves directly to a U.S. university representative instead of through alumni.
- Leverage Digital Video Conferencing (DVC) and interactive online sessions held in collaboration with EducationUSA Advising Centers. These are effective ways to reach students, their parents, and school counselors. Graduate or professional students applicants appreciate the opportunity these online platforms provide to discuss in detail questions related to specific programs of study. Most advising centers are equipped with multimedia facilities and can accommodate 70+ students at a time.
- Let EducationUSA advise you about how to effectively reach out to populations in cities beyond just the capitals of countries where increasing numbers of people have high aspirations for upward social mobility.

- Emphasize the value of a degree from your institution, options for affordable financing and scholarships, as well as the successful career trajectories of your alumni.

REGIONAL EDUCATIONUSA EVENTS

Use the EducationUSA website to find country specific information about upcoming fairs, webinars, and other events and activities. Several EducationUSA Advising Centers are planning local events during the year.

FAIRS AND CONFERENCES

In addition to the many in-person student recruitment opportunities offered through participation in EducationUSA fairs and conferences, representatives of U.S. institutions often also capitalize on these events to receive a country briefing from EducationUSA advisers, meet with U.S. embassy public affairs and consular staff (subject to scheduling availability), make a presentation at an EducationUSA Advising Center, or visit a local high school or college. Contact the EducationUSA staff organizing the event to explore options for maximizing the impact of your participation.

- **India:** EducationUSA Fairs co-hosted by USIEF and IIE, November. USIEF Alumni Fair, December/January. Contact EducationUSA's Country Coordinator, Renuka Raja Rao: Renuka@usief.org.in.
- **Afghanistan, Bangladesh, Nepal, Pakistan, Sri Lanka:** EducationUSA South Asia Tour, spring.



Supported by the U.S. embassies reach thousands of students through university fairs, school visits, and cultural activities. Contact Reac.Lahore@educationUSA.info.

- **Pakistan:** Dawn Education Expo, Karachi, Lahore, Islamabad; February 2014. Contact Shazia Khan at EducationUSA in Islamabad: shazia@usefpakistan.org.
- **Bangladesh:** Annual U.S. Trade Fair, co-sponsored by the U.S. Embassy Dhaka and the American Chamber of Commerce, Dhaka. February 2014. Contact Arefin Jahan at EducationUSA in Dhaka: JahanAX@state.gov.
- **Kazakhstan:** Annual EducationUSA Fairs, Almaty, Astana and Atyrau. a2 International Student Fair (Spring, Fall), Begin Group International Education Fair (Spring, Fall), Globus Education Fair (Winter).
- **Turkmenistan:** Government-sponsored annual International Exhibition and Scientific Conference, Ashgabat, November.

CENTER EVENTS

Check with individual centers to find out what activities they have planned. Some ongoing highlights include:

- **Scheduling school visits:** Many centers have high school counselor groups where counselors meet regularly to share best practices and learn more on topics such as student visas, writing personal statements, application timelines, and how to help students find their best institutional fit.
- **Uzbekistan:** EducationUSA has implemented weekly group sessions covering various aspects of studying in the United States.
- **Kazakhstan:** U.S. Embassy Astana organizes regular webchats for prospective students to learn more about opportunities to study in the United States. Advisers also coordinate competitive college clubs, a college prep summer camp, and debate clubs.

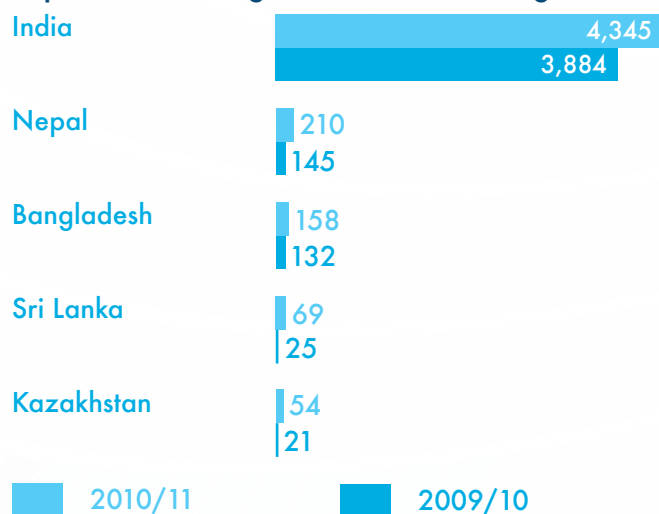
BEST TIMES OF YEAR TO INTERACT WITH STUDENTS

- **Afghanistan:** April–June and August–October, except in the southern provinces of Kandahar and Nangarhar, where best times are September–December and February–April.
- **Bangladesh:** February–March.
- **India:** April–December and also in January–February. School and college examinations normally take place between February and April.
- **Nepal:** Avoid the largest Nepali festival period, which

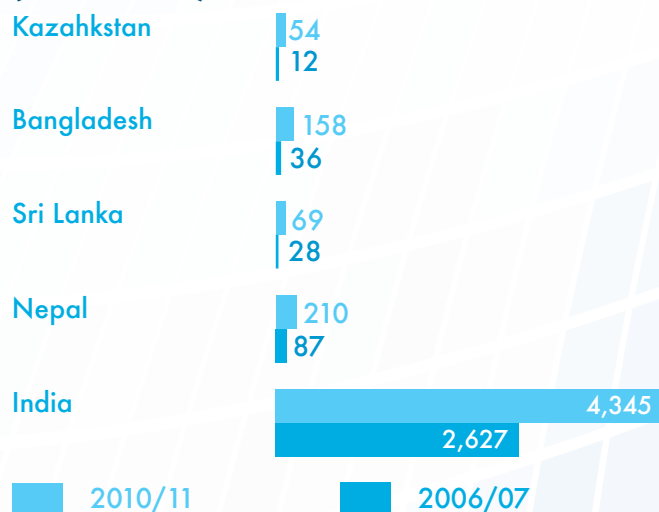
typically falls in October. During this time, schools and colleges are closed and many students will travel home.

- **Pakistan:** September–January.
- **Sri Lanka:** Avoid April and August. The best times to engage are July after exams and October after exams.
- **Tajikistan:** February–April and October–November. Join education tours in April or during International Education Week in November.
- **Kazakhstan:** September–May is a good time for school

Top Five Receiving Countries in the Region



Five Countries (with over 100 students) with Highest Percentage Growth, U.S. Students (5-Year Trend)



Source: Institute of International Education, funded by a grant from the U.S. Department of State, Open Doors Report on International Educational Exchange, 2008-2012.

visits as it is the academic year. October, November, February and March are Fair times, and a good time to reach target audiences. Avoid summer, the first 10 days of January, and the last week of March as they are all big school breaks.

- **Kyrgyzstan:** September – November, February – April (the exams take place in December– January, May– June). Consider joining EducationUSA Fairs in September and October.
- **Turkmenistan:** August–November, April–June. Avoid the month of Ramadan in Afghanistan, Pakistan, Bangladesh, Tajikistan, Turkmenistan, and Uzbekistan.

U.S. STUDY ABROAD IN THE REGION

South and Central Asia offers an exciting alternative to traditional study abroad programs. According to IIE's Open Doors Report 2012, India is the only SCA country in the top 25 destinations for U.S. students, and almost 12 percent more U.S. students studied in the region in 2010/11 than the previous year (4,345 in 2009/10). U.S. students seem to be attracted to Bhutan and the Maldives for studies related to the environment. The recent rise in interest in Bangladesh is due to the increasing prestige and popularity of private universities there, drawing children of Bangladeshi emigrants who want to have a taste of their ancestral country.

The State Department continues the "Passport to India" initiative: <http://ow.ly/kUGR8>. This initiative relies on private-sector funding to promote business internships linked to student's academic interest areas, summer scientific research internships, and service learning internships in India.



4,345

India is the top destination
for U.S. Study Abroad in the
region



WESTERN HEMISPHERE

Anguilla, Antigua and Barbuda, Argentina, Barbados, Bolivia, Brazil, Canada, Chile, Colombia, Costa Rica, Dominica, Dominican Republic, Ecuador, El Salvador, Grenada, Guatemala, Guyana, Haiti, Honduras, Jamaica, Mexico, Nicaragua, Panama, Paraguay, Peru, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines, Suriname, Trinidad and Tobago, Uruguay, Venezuela

**115 EducationUSA
Advising Centers
in the Region:**

57 Comprehensive
45 Standard
13 Reference

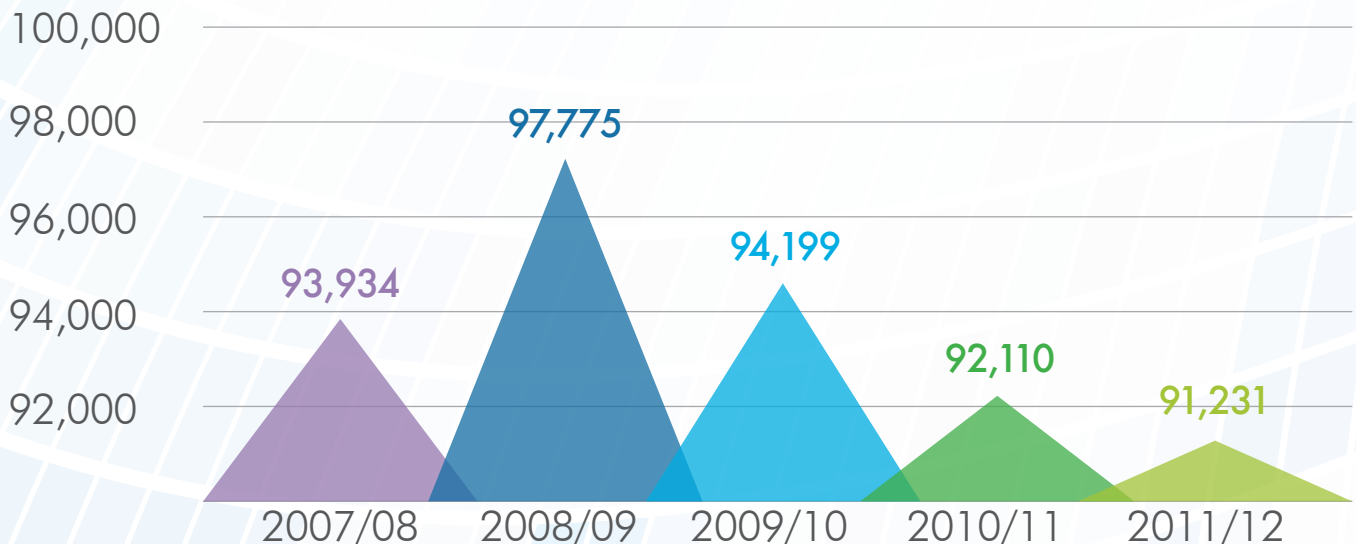
REGIONAL EDUCATIONUSA PROFILE

Ten new EducationUSA Advising Centers opened within the last two years in Brazil (2), Chile, Colombia (2), Ecuador, Haiti, Honduras, Mexico, and Canada—further expanding the network's reach in the region. Opportunity Funds that support talented, economically disadvantaged undergraduate and graduate students with the upfront costs of applying to U.S. institutions are currently available through EducationUSA Advising Centers in Argentina, Brazil, Bolivia, Chile, Colombia, Costa Rica, Ecuador, El Salvador, Guatemala, Honduras, Nicaragua, Panama, Peru, Paraguay, and Venezuela. EducationUSA has conducted extensive outreach to broadcast Opportunity Funds to both prospective undergraduate and graduate students. Through EducationUSA competitive college clubs in Mexico and El Salvador, advisers meet on a regular basis with top high school students to guide them through the college application process. Monthly meetings and individual appointments are held to guide students on finding the best institutional fit to meet their needs academically, socially, and financially.

Advisers in the Western Hemisphere are keen on using social media to disseminate information about U.S. higher education to local students. To reach larger numbers, advisers are leveraging Facebook to advertise EdUSA Connects sessions, visits to centers by U.S. university representatives, and the EducationUSA Weekly Update. Argentina, Brazil, Chile, Colombia, Ecuador, Paraguay, and Peru are organizing outreach activities to less frequently visited cities and provinces, to promote EducationUSA services to new student audiences through social media. Advisers are using

Student Mobility (5-Year Trend)

Source: Institute of International Education, funded by a grant from the U.S. Department of State, Open Doors Report on International Educational Exchange, 2008-2012.





technology tools such as Google Analytics to electronically target their online services and marketing efforts to nontraditional audiences in remote locations like the Patagonia and the Amazon. In the past year, Advisers throughout WHA hosted 326 EdUSA Connects webinars to link U.S. college and university representatives with local students provide them with information on topics related to U.S. higher education.

Advising centers in Brazil and Chile partnered with local governments to advertise undergraduate and graduate study abroad scholarships. They promoted these opportunities in local languages on government websites, encouraging students in these countries to apply to U.S. universities. EducationUSA Chile conducted outreach sessions with the Chilean government to promote the United States as a destination to BECAS Chile scholarship holders. They have also paved the way for universities to interact directly with BECAS Chile and establish government to government and government to university relationships.

A number of local universities in the region are interested in developing partnerships with U.S. universities. EducationUSA advisers facilitate contact between local and U.S. universities through workshops on the standards of best practices for study abroad in Brazil, Colombia, Mexico and El Salvador. Several U.S. higher education associations actively engage with the higher education leadership in Brazil to establish new guidelines for campus internationalization.

REGIONAL OVERVIEW

Canada, Latin America, and the Caribbean make up the Department of State's Western Hemisphere region (WHA); a diverse region that covers 28.4 percent of the

earth's land area, spread over 35 countries, and boasts a combined total population of approximately 900 million. With five countries among the top 25 sending countries of origin of international students to the United States (Canada, Mexico, Brazil, Colombia, and Venezuela), and 91,231 students from the region in the United States during the 2011/12 academic year, Western Hemisphere countries are second only to Asia in terms of international student mobility to the United States. The flow from Latin America and the Caribbean has been influenced by the broad support and funding for study abroad that a number of countries (Brazil, Chile, Colombia, Dominican Republic, Ecuador, and Panama) currently provide, as well as by growing and stable economies in major sending countries, including Mexico, Brazil, and Colombia. Close to 51 percent of students from the region study at the undergraduate level, and 33 percent of students study at the graduate level. Approximately 16 percent are non-degree seeking or enrolled in OPT (Open Doors, 2012).

Brazil, Chile, and Peru dramatically expanded their economies through natural resource extraction industries including petroleum, natural gas and mineral mining. Panama's economy is growing steadily through IT and canal-related industries. As a result, Brazil, Chile, Peru, and Panama have allocated substantial resources to develop creative industries (from entertainment to game design), while also expanding science, technology and innovation initiatives through international exchange. This trend has also resulted in increased efforts to internationalize local universities and research centers. In Brazil and Chile, for example, investment in creative industries is bringing together academia and industry through partnerships between foreign universities in an unprecedented way. The U.S. Mission in Brazil has named education its number one priority.

RECENT TRENDS

- In March 2011, President Obama announced his “100,000 Strong in the Americas” initiative to increase the number of Latin American and Caribbean students studying in the United States and vice-versa. As it grows, this initiative will foster region-wide prosperity through greater international exchanges of students—our future leaders and innovators. Currently, South America (Andes and Southern Cone) sends 36 percent of Western Hemisphere students to the United States, followed by Canada with 30 percent, Mexico and Central America with 22 percent, and the Caribbean with 12 percent (Open Doors, 2012).
- The United States continues to be the region’s premier international destination for students, despite increasing competition from Europe (Spain and the United Kingdom) and other Western Hemisphere countries (Canada, Cuba, and Chile). The number of Latin American students studying outside of their own countries has increased. The flow of students from WHA countries to the United States increased in 2011/12, with growing numbers from Venezuela, Ecuador, Bolivia, Mexico, Honduras, Dominican Republic, the Bahamas, and Brazil. The high cost of studying in the United States, the continuing misperception that it is difficult to get a student visa, and the possibilities for employment that other countries offer following graduation influence students’ decisions to study elsewhere.
- In spite of the economic downturns in the United States and in Europe, sustained economic growth in Argentina (8.9%), Peru (6.8%), Chile (6.0%), Colombia (5.9%), the Dominican Republic (4.5%), Mexico (3.9%), Nicaragua (5.1%) and Brazil (2.7%), is a key factor in driving student mobility (World Bank: Annual Percentage GDP Growth from 2008-2012).
- Due to migratory trends and in-state tuition opportunities, 40 percent of Caribbean students study in Florida and New York. Forty-five percent of Mexican students attend institutions in Texas because of in-state tuition options, geographic proximity and historical ties. (Source: IIE International Student Census Survey data for Open Doors Report 2012) Of that 45 percent, nearly half study at U.S. institutions on or near the border, indicating that a large portion of Mexican students are crossing the border to attend classes.

Regional Student Totals by Top 5 Countries of Origin

Country Name	2011/2012	% Change from 2010/11
Canada	26,821	-2.6%
Mexico	13,893	1.3%
Brazil	9,029	2.9%
Colombia	6,295	-2.5%
Venezuela	6,281	14.4%

Five Countries of Origin (with over 100 students) with Highest Percentage Growth, International Students (5-Year Trend)

Country Name	2007/08	2011/12	% Change
Venezuela	4,446	6,281	41.3%
Dominican Republic	1,159	1,610	38.9%
Honduras	1,068	1,407	31.7%
Chile	1,685	2,203	30.7%
British Virgin Islands	93	116	24.7%

Source: Institute of International Education, funded by a grant from the U.S. Department of State, Open Doors Report on International Educational Exchange, 2008-2012.

41.3%

Venezuela has the largest percentage growth in the region over the last five years (with over 100 students)

COUNTRIES IN THE SPOTLIGHT

- **Canada:** Placing fifth among the leading countries of origin of international students studying in the United States, Canadian students are now considering study in other countries to complete their academic programs. In an effort to continue the steady flow of students from the northern neighbor, EducationUSA established an advising operation in Canada during 2012 with support from the Fulbright Commission and the U.S. Embassy.
- **Mexico:** After a significant decline in the number of Mexican students studying in the United States in 2009/10, numbers are slowly growing with an increase in 2011/12 of 1.3 percent to 13,893 students. The Mexican government demonstrated a commitment to expanding academic exchanges between the U.S. and Mexico by funding the Fulbright-Garcia Robles Scholarships and developing scholarships for foreign academics to travel to Mexico to engage in scientific, social and artistic research.
- **Panama:** The Panamanian government, with the cooperation of the U.S. Embassy and the EducationUSA Advising Center, will support the establishment of one of three regional centers around the world to provide training for hearing-impaired students. This initiative will include an agreement between a U.S. and a Panamanian institution to allow faculty exchanges for teacher training, expanding to student mobility in the future.
- **Brazil:** Since the launching of the Brazilian Scientific Mobility Program (Ciencias em Fronteiras in Portuguese), Brazil has already sent 23,000 students abroad and aims to send 101,000 students abroad over the next four years. The primary goal of the program is to promote the expansion of science, technology, and innovation through international exchange. The United States is the leading destination for these students. New initiatives have included innovative programs such as the partnerships with Historically Black Colleges and Universities (HBCUs) and a new intensive English language component. The Brazilian government has also launched an English Without Borders in-country program to prepare students to study in English speaking countries. Policy makers are in the process of expanding the Scientific Mobility Program to include to four year Ph.D. degree granting programs.
 - o Undergraduate: The Institute of International Education (IIE) is responsible for the selection of U.S. universities and the placement of the one-year study abroad program <http://ow.ly/kUH8r>. The United States was the first country to receive a cohort of Brazilian undergraduate students. The U.S. Mission in Brazil, the Fulbright Commission, IIE, and EducationUSA work together to organize pre-departure orientations and visa interviews for all students accepted into the program twice every year. A call is open every semester for the undergraduate one-year study abroad semester.
 - o Graduate: LASPAU: Academic and Professional Programs for the Americas is the organization responsible for the placement of Ph.D. students at U.S. universities. The Brazilian government intends to offer 9,790 Ph.D. degree-granting scholarships in the sciences, 24,600 one-year scholarships for Ph.D. students to conduct research abroad, 11,560 postdoctoral scholarships (one- to two-year research grants), and grants for visiting scholars—both renowned scientists and young international doctorate holders—to interact with the Brazilian scientific community. Also, there is demand to increase the presence of international scientists and technical personnel in priority fields of science and innovation. EducationUSA is working with Brazilian government agencies, U.S. embassies and consulates in Brazil to attract half of these numbers to U.S. universities. To learn more, visit <http://ow.ly/kUHNf>. EducationUSA advisers in Brazil created a blog in Portuguese with links to the Brazilian governmental agencies websites where students can search for U.S. universities granting Ph.D. degrees in the sciences: <http://ow.ly/kUHea>.
- **Ecuador:** The Government of Ecuador has designed an ambitious new higher education law that seeks to increase the number of faculty members at local universities with advanced degrees. In support of this effort, the National Secretariat of Higher Education, Science, Technology and Innovation (SENESCYT) has designed a scholarship program that will sponsor master's, Ph.D. and post-doctoral students abroad. The average grant is U.S. \$50,000 a year. In addition, the Ecuadorian government has also announced the availability of scholarships for undergraduate study.

WHAT TO EXPECT IN THE NEXT THREE TO FIVE YEARS

North & Central America and the Caribbean

- While the number of Mexican students studying in the United States is again slowly on the rise, drug-related violence continues to plague the country at a growing rate. Policy analysts are hopeful that the newly formed government will succeed in stemming drug violence in the region, which could have a positive effect on student and scholar mobility.
- The Caribbean Examinations Council (CSC), which oversees curriculum, standardized exams, and diplomas on 19 English- and Dutch-speaking islands, continues

to seek articulation agreements with U.S. institutions to facilitate the transfer of credit for CAPE exams (equivalent to A Levels) and CXC Associate Degrees. As a result, participating U.S. institutions will be in a position to increase the number of Caribbean students studying on their campuses.

- Panamanian and Dominican students continue to express interest in studying in the United States and in options for fully funded undergraduate and graduate-level scholarships through their governments' ministries of science, technology, and education.

South America: Andean Region

- The Peruvian government launched the "BECAS 18" scholarship program in 2012, which is designed to provide academically talented, economically underprivileged students with funding for undergraduate study. While the initial stages of the program provide funding for university study in Peru, work has begun on developing program components for both graduate and undergraduate study in other countries. While all fields of study will be considered, emphasis will be placed on education in the sciences and technology. The volume of applications from Peruvian students for graduate funding is expected to be high.
- The Ecuadorian government's funding program for graduate and undergraduate study abroad is considered the most ambitious program of its kind in the country's history. The government will establish a requirement that universities increase the number of faculty with Ph.Ds. and will provide generous funding for both graduate and undergraduate study abroad. This development is expected to increase the number of Ecuadorian applications to graduate schools in the United States.
- The Ecuadorian government's plan to build a "city of knowledge", named Yachay, constitutes another positive development for study abroad in the region. The new Experimental Scientific University, the future centerpiece of the city, will concentrate on developing five key areas: life sciences; information and communication technologies; renewable energy and climate change; petro chemistry; and nanoscience. The university will offer graduate and post graduate programs only. Public research institutions, as well as national and international firms that specialize in the production of high technology, are also expected to be based in the new city.
- The Colombian Foundation COLFUTURO continues to offer 1,500 loans/scholarships to Colombian students to study abroad each year and provides loans of up to \$25,000 per year for qualified graduate students. Twenty-five percent or more of the recipients of this funding are expected to matriculate in graduate programs in the United States.
- A steady growth in the flow of students from Ecuador and Bolivia, as well as continued increases in the numbers from Venezuela, can be expected.

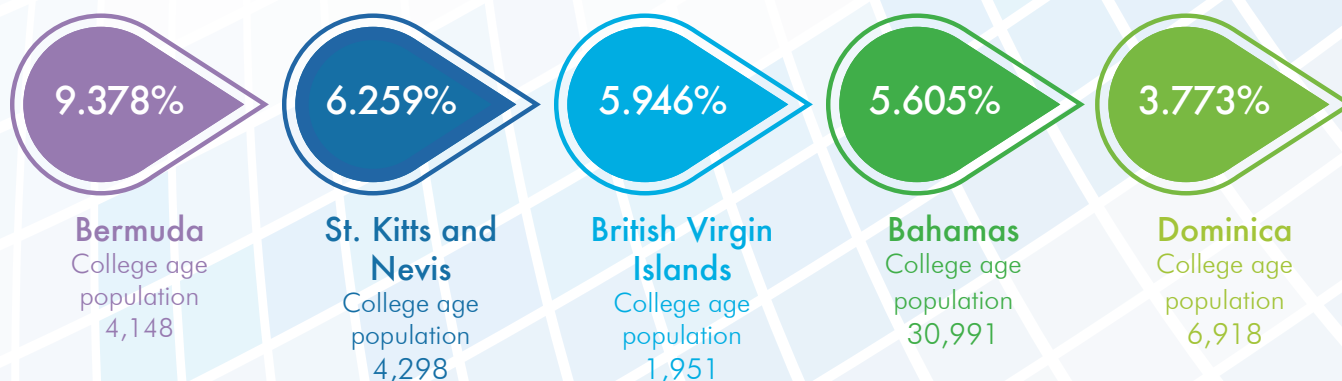
South America: Southern Cone

- Due to the Brazilian Scientific Mobility Program, U.S. colleges and universities have an unprecedented opportunity to recruit Brazilian students in not only the STEM fields, but also in creative industries (communication, journalism, law or any other field related to the innovation industry), and the number of Brazilian students studying in the United States will grow each year. Given the development of partnerships being established between Brazilian and U.S. universities, it is expected that the number of U.S. students coming to Brazil will increase as well.
- The Brazilian government seeks to expand existing partnerships as a means to encourage collaboration on strategic projects and university-to-university exchanges.
- Argentina is focused on the expansion of the number of U.S. students at Argentine universities. Presently, Argentina is the leading receiving country in South America for U.S. students, whose numbers have increased over the past three years. The numbers are expected to increase even more as more Argentine universities begin to recruit U.S. students. Several Argentine universities are eager to form partnerships with U.S. universities to teach Spanish and Latin American studies courses to visiting U.S. students in order to further Argentina's position as a top U.S. study abroad destination. The Argentine government has also launched a scholarship program for U.S. study for Argentine students.
- The new Chilean government has changed the criteria for the BECAS Chile scholarship program and will now only grant funding to students who have unconditional admission offers or conditional admissions offers pending the successful completion of an English language training program. These changes will allow scholarship candidates to apply to a greater number of U.S. institutions.
- Although Chile has traditionally been a large sender of graduate students, EducationUSA advisers have noticed a rising interest in undergraduate studies.

FOREIGN GOVERNMENT AND PRIVATE FUNDING

- **Argentina:** Expect to see continued flow of students from Argentina seeking to study in the United States, in particular master's and doctorate programs, due in large part to the new scholarship BEC.AR, which was launched in 2011 by the Argentina national government. BEC.AR provides funding for qualified Argentine students to pursue master's and doctorate degrees in U.S. universities in the STEM areas. Following a successful start in 2011, the government plans to continue to increase the number of scholarships awarded per year, reaching 1,000 in the next four years. The city government of Buenos Aires, following the lead of the Argentine national government, also launched a scholarship program in 2012. The goal of the program is to send qualified Argentines to study in master's and doctorate programs in the United States, prioritizing the areas of science and technology.
- **Bahamas:** The Lyford Cay Foundation awards approximately 110 scholarships to Bahamian students for study abroad, 58 percent of these awards are for completion of undergraduate studies and 31 percent for technical and vocational training.
- **Barbados:** The Barbados Scholarships and Exhibitions are merit-based undergraduate scholarships awarded to students who have received very high scores in the CAPE examinations or in an associate degree program at the Barbados Community College. The scholarship pays for tuition, airfare and provides a small stipend of about \$3,500 USD per year. Approximately 30 scholarships are awarded each year. Students can study at home or abroad. Additionally, the National Development scholarships provide approximately 10 scholarships each year in various disciplines based on the training needs of the public and private sectors of the country. The National Development scholarships are awarded for undergraduate and graduate study. Most or all National Development scholars study abroad.
- **Chile:** BECAS Chile, launched in 2008, is a Chilean Ministry of Education initiative that aims to develop human capital by sending 30,000 Chilean students abroad by 2017. The initiative is focused mainly on graduate studies (masters and Ph.Ds.) with a recent emphasis on Ph.Ds. in the STEM fields. The Chilean government is actively pursuing State-level agreements in the United States such as those signed with Massachusetts and California. These MOUs eased the development of Chilean Ministry of Education partnerships with state universities in Massachusetts and California and will result in increased student mobility.
- **Colombia:** In 2012, the Colombian Foundation COLFUTURO offered 988 loans/scholarships to qualified Colombian graduate students to study internationally. Also, as of 2012, COLFUTURO is administering the COLCIENCIAS program which, along with the National Planning Department (DNP) Program, provides funding for study leading to doctoral degrees abroad, primarily in the science, technology, and engineering fields. This program offers financial support for approximately 700 students per year (30 percent to study in Colombia and 70 percent to study abroad). This scholarship provides more than \$220,000 USD per student.
- **Dominica:** The Dominica government awards one "Island Scholarship" each year to the student who has earned the highest score in the CAPE examinations. Additionally, the Dominica government awards approximately five scholarships annually to the best student in each of the five faculties of the Dominica State College.

Five Countries of Origin with Highest Per Capita College-Age Student Mobility to the United States



Sources: UNESCO Institute for Statistics, Education Table 2 "Demographic and economic data"; School age population-Tertiary- Total for 2010, 2011, and 2012, <http://ow.ly/lbygl>. This chart excludes countries that had no data available or were not reported by UNESCO. Student totals from Open Doors 2012.

- **Dominican Republic:** The Ministry of Higher Education, Science, and Technology (SEESCyT) awarded 1,201 scholarships in 2009 for Dominicans to study abroad at all higher education levels; 10 percent of those students come to the United States. SEESCyT's current priority is to increase funding for graduate studies—especially at the doctoral level—in telecommunications, information technology, engineering, music composition, and film. The Ministry seeks to develop partnerships with research-focused universities in the United States to establish articulation agreements and increase the numbers of their students studying in the United States.
- **Ecuador:** The National Secretariat of Higher Education, Science and Technology (SENESCYT) continues to expand opportunities for study abroad for both graduate as well as undergraduate study and expects to provide an unlimited number of scholarships over the next few years. With more than a thousand scholarships awarded in 2011, the goal for 2012 was to provide up to 2,000 scholarships to Ecuadorian students for study in foreign universities and to further expand the program in 2013. The open competition program to fund graduate study provides average grants of U.S. \$50,000 per year with preference given to STEM fields, economics, public administration and the fine and performing arts. The Universidad de Excelencia program provides funding for study in any field at the graduate as well as the undergraduate level. For undergraduate study, the program provides up to U.S. \$250,000 per student in addition to an allowance of up to U.S. \$4,000 for travel and insurance. The undergraduate program does not affect the funding or number of scholarship recipients in the graduate program. Recently, the scholarship program was expanded to include graduate and post graduate study for tenured faculty in Ecuadorian universities. SENESCYT published a list of universities around the world to which they prefer Ecuadorian students apply and enroll: <http://ow.ly/kUI8E>. In addition to the grant programs, the Ecuadorian government's Instituto Ecuatoriano de Crédito Educativo y Becas provides qualified students with an additional source of funding through loans, which provide a limitless amount of funding to qualified individual students that will cover the entire costs of study in a foreign university.
- **Panama:** According to the National Secretariat of Science Technology and Innovation's (SENACYT) strategic plan for 2010-2014, the government will award 830 international scholarships for undergraduate and graduate level studies (165 bachelors, 415 masters, 250 doctorates) in biological and health sciences, agricultural sciences, communication and information technology, and transportation and logistics. SENACYT seeks to sign articulation agreements with institutions overseas, and the United States is a priority destination.
- **Organization of American States (OAS):** Students from member countries are eligible for up to U.S. \$15,000 in Rowe Fund loans. Scholarships for up to U.S. \$30,000 are available at the graduate level throughout the region and for undergraduate studies by students from English-speaking Caribbean countries.
- **Uruguay:** Under a new agreement between the Uruguayan government and the Fulbright Commission, Uruguayan students will receive local government funding to pursue graduate studies in the United States. In addition, the National Institute of Agricultural Research has renewed an agreement with Fulbright to fund their researchers in pursuing graduate programs and short-term research visits to U.S. universities.

VIRTUAL AND SOCIAL MEDIA USAGE

- EducationUSA advisers are actively using social media. Although the most popular social media venues vary from country to country, the most commonly used platforms throughout the region are Facebook, Twitter, blogs, and Orkut. EducationUSA Chile has developed a social media campaign about the realities and advantages of studying in the United States.
- According to statistics compiled by ITU, the UN agency for Information and Communication Technologies, and other sources published on <http://ow.ly/kUG2A>, the Western Hemisphere has an internet penetration rate of 43.9 percent with some 274.9 million internet users. Comparing that data to Facebook usage statistics on www.checkfacebook.com shows that 70 percent of internet users in the region also use Facebook.
- Internet access speeds in most urban areas is similar to the United States. Rural access may be more limited.

SUCCESSFUL RECRUITING STRATEGIES

- Attend regional college fair tours in South America (September), Mexico (October), Central America (October), and the Caribbean (October/November).
- Interact with students through EdUSA Connects webinars and in-person presentations at advising centers. Make an effort to reach out to EducationUSA advisers from Temuco, Chile to the middle of the Amazon who are not often visited by representatives of U.S. institutions, but have students interested in studying in the United States.
- Use alumni to recruit students, but do not underestimate the value of sending admissions staff to build trust and name recognition. Consult EducationUSA when sending alumni to represent your institution.

- Highlight anecdotes on institutional support and services to which students from the region can relate (culture, history, politics, sports, food, arts, etc.).
- Subscribe to the EducationUSA HEI news and find out about special conferences in the region that can be integral to student recruitment and the establishment of partnerships. From October 16-18, 2013, Mexico will host the Conference of the Americas on International Education in Monterrey, Mexico. The Conference is designed to promote partnerships between universities in the United States and their counterparts abroad. The Conference will partner with the AMPEI Asociación Mexicana para Educación Internacional.
- Use Spanish-language websites to attract students from government scholarship programs. Contact EducationUSA Argentina about the possibility of placing similar pages in Spanish on your website.

REGIONAL EDUCATIONUSA EVENTS

Use the EducationUSA website and country Facebook pages to find country specific information about upcoming fairs, webinars, and other events and activities. Several EducationUSA Advising Centers are planning local events during the year.

FAIRS AND CONFERENCES

Use the EducationUSA website and country Facebook pages to find country specific information about upcoming fairs, webinars, and other events and activities. Several EducationUSA Advising Centers are planning local events during the year.

In addition to the many in-person student recruitment opportunities offered through participation in EducationUSA fairs and conferences, representatives of U.S. institutions often also capitalize on these events to receive a country briefing from EducationUSA advisers, meet with U.S. embassy public affairs and consular staff (subject to scheduling availability), make a presentation at an EducationUSA Advising Center, or visit a local high school or college. Contact the EducationUSA staff organizing the event to explore options for maximizing the impact of your participation.

- **Caribbean:** College Fair Tour; Anguilla, Bahamas, Barbados, Bermuda, St. Maarten, and Trinidad, late October through early December. More countries will be added and dates will be finalized by May 2013. <http://ow.ly/kUBNW>
- **Mexico:** College Fair Tour; Chihuahua, Mexico City, Guadalajara, Queretaro, Monterrey, Tampico, and Puerto Vallarta, late September through mid-October
- **South America:** EducationUSA Fair Tour; Brazil (Brasilia, Sao Paulo, and Río de Janeiro), Argentina

In calendar year 2012, EducationUSA in Western Hemisphere made 723,323 contacts.



344,239 contacts made through advising centers		206,824 contacts made through outreach activities		131,806 contacts made through virtual platforms*	
Advising Center-based Contacts	341,736	Education Fairs	137,572	Social Media Platforms	127,749
U.S. Institution Representative Visits	2,503	American Corners / Centers	3,986	Webinars / DVCs	4,057
		Local Universities / Secondary Schools	53,095		
		Other Fairs / Conferences / Seminars	22,681		
		Host Government Events	1,017		
		Embassy / Consulate Events	3,244		
		Public Locations	13,512		
		Other Activities	12,171		

* Includes social network page likes, profile friends, or group members; video views; Skype contacts; blog and mini-blog followers; digital video conference participants; and EdUSA Connects webinar participants.

(Buenos Aires), Uruguay (Montevideo), Chile (Santiago), Peru (Lima), Ecuador (Quito and Guayaquil), Colombia (Bogotá), and Venezuela (Caracas); August 31–September 21, 2013. <http://ow.ly/kUBNW>

- **Central America and Dominican Republic:** Community College Fair; Guatemala, Honduras, El Salvador, Nicaragua, Costa Rica, Panamá and the Dominican Republic; first week of October.
- **Mexico, Brazil and Chile:** EducationUSA/IEE STEM Field Fair; April 21–May 6, 2013.

CENTER EVENTS

Check with individual centers to learn more about the activities they have planned. Some ongoing highlights include:

- Participate in EdUSA Connects sessions and web chats with Brazilian Scientific Mobility Program students in Brazil. The EducationUSA country coordinator is organizing online sessions with representatives from graduate programs in sciences in U.S. universities to speak to prospective Brazilian students who are applying for the SWB program. For more information, contact countrycoordination-br@educationusa.info.
- Each year the EducationUSA Advising Center in Mexico City hosts a College Counselor Workshop as part of International Education Week in November. Contact mexicodf@educationusa.info if you are interested in taking part and contributing to this program.
- The EducationUSA Advising Center in Monterrey, Mexico and the U.S. Consulate organize alumni fairs. Presenters at these events include consular officers, local authorities and alumni from U.S. institutions. For more information, contact monterrey@educationusa.info.
- EducationUSA Costa Rica has designed an EducationUSA camp through which they bring students together and train them on essay writing, testing practices and college search. This camp is a hands-on approach to preparing students for U.S. college applications. If you are interested in taking part of this camp, please contact costarica@educationusa.info.
- Several EducationUSA Advising Centers in the region offer pre-departure orientations, which usually take place in early July and are open to any student accepted to a graduate or undergraduate program at a U.S. university. Encourage admitted students to contact an EducationUSA Advising Center or check the website for upcoming pre-departure orientations: www.educationusa.state.gov.
- Pair up with currently enrolled Latin American students to participate in EdUSA Connects sessions during International Education Week (November 2013). The sessions feature both the admissions counselor's and

current international students' perspectives on studying at U.S. universities. This is a great opportunity for prospective students to hear from your current students about their experience at your university. For more information, contact any EducationUSA Advising Center in a country you want to target.

- EducationUSA in Uruguay has worked with the commercial and the public affairs sections at the U.S. Embassy, participating in their outreach efforts to work with local travel agencies in including visits to U.S. schools in tours that target students between the ages of 15 and 25. The top travel agencies published information about EducationUSA Uruguay in a magazine that is distributed in every high school and university throughout the country.

BEST TIMES OF YEAR TO INTERACT WITH STUDENTS

Canada: September–November, January–early March, May

Mexico: September–October, January–early March, May

Central America: January–March, September–October

Caribbean: September–November, January–early March

South America (Andean and Southern Cone): March–June, August–November

Avoid the two weeks surrounding Easter for all of Latin America and the Caribbean; Carnival in Latin America as well as independence anniversaries should also be avoided through the region.

U.S. STUDY ABROAD IN THE REGION

According to the 2012 Open Doors Report on International Educational Exchange, Costa Rica is the region's top receiving country with 7,230 U.S. students studying abroad, a 15.5 percent increase over the previous year, making it the eighth most popular study abroad destination for U.S. students (Open Doors, 2012).

Argentina is the 10th leading destination of U.S. students, receiving 4,589 students. Watch for Brazil to increase the number of U.S. students due to the partnerships established between Brazilian and U.S. universities through Brazilian Scientific Mobility Program. U.S. students in Brazil increased 12.5 percent increase over the previous year to 3,485. Chile and Ecuador are also leading host destinations in the region, ranked 18th and 20th, respectively. Peru hosted 2,448 U.S. students in 2010–11 and these numbers are expected to increase.

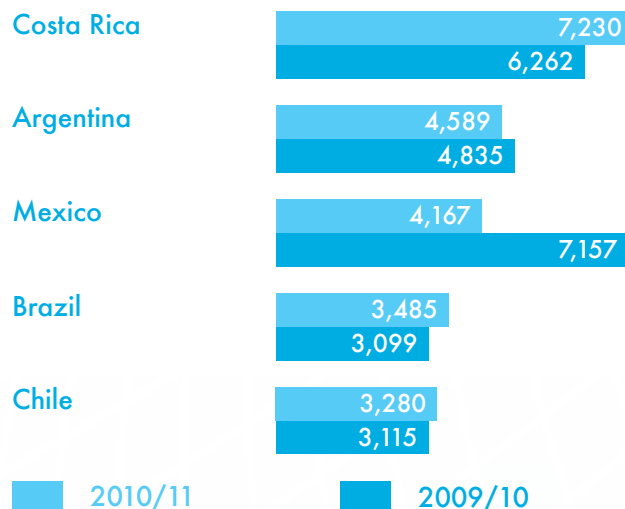
Mexico had long been the largest receiving country for U.S. study abroad students; it is currently ranked 13th in the world. Due to concerns related to the H1N1 outbreak in spring 2009 and drug-related violence throughout the country, numbers have decreased significantly (4,167, according to Open Doors 2012 data). However, there continue to be many viable institutional options for U.S. study abroad in cities like Mexico City, Merida, Guanajuato, and Puebla, among others. U.S. Department of State Travel Warnings provides a state-by-state assessment of security conditions: <http://ow.ly/lbynT>. In addition, the publication *Yes, You Can Study in Mexico*, is an excellent resource published and distributed by the U.S. Embassy in Mexico.

Caribbean countries hosted a total of 4730 students, a 10.2 percent increase over the previous year, with the Dominican Republic hosting the largest number (1,343) (OpenDoors, 2012).

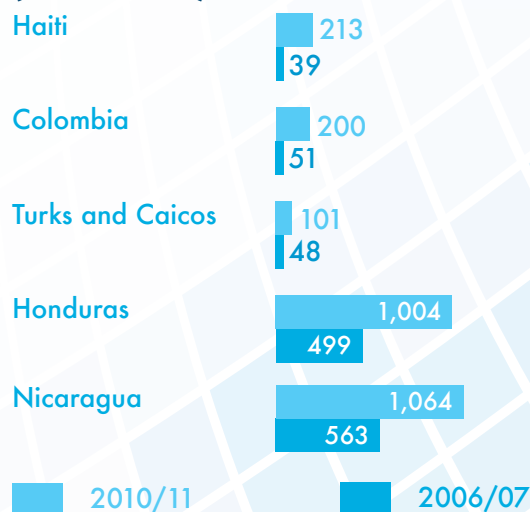
446.2%

Haiti has the highest growth in U.S. students over the past five years

Top Five Receiving Countries in the Region



Five Countries (with over 100 students) with Highest Percentage Growth, U.S. Students (5-Year Trend)



Source: Institute of International Education, funded by a grant from the U.S. Department of State, Open Doors Report on International Educational Exchange, 2008-2012.





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